

ALUMNI PLAYBOOK



CHARLES AND LYNN
SCHUSTERMAN
FAMILY FOUNDATION

THE GAME HAS CHANGED.

It's not enough to simply create a successful program. You need an effective strategy to maintain engagement with your participants once the program concludes.

The Alumni Playbook is a hands-on toolkit designed to help you tackle what comes next, whether you are just starting to think about your alumni or are a veteran in the space looking to revitalize your alumni community.

ACKNOWLEDGEMENTS:

The development of the Alumni Playbook has been a collaborative effort, and we have benefitted from the time, wisdom and contribution of many individuals and organizations. We would like to thank Mark Dollhopf (Former Executive Director, Association of Yale Alumni), Andrea Pursley (Executive VP of Alumni Affairs, Teach For America), Naya Bloom (VP of Alumni Leadership Development and Social Innovation, Teach For America), Dar Vanderbeck (Managing Director of Social Innovation, Teach For America) and Angie Atkins (Director, Wexner Heritage Alumni) for contributing their expertise and sharing invaluable lessons from their own alumni communities. We would also like to thank the professional teams at AVODAH, Birthright Israel Excel, The Bronfman Fellowships, Entwine, Moishe House, ROI Community and Tevel b'Tzedek for working with us to develop case studies on their alumni programs. The Alumni Playbook would not have been possible without your generosity of time and insight. We greatly appreciate your willingness to share your knowledge for the benefit of the broader community.

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GET STARTED »

WHAT'S INSIDE

Read a letter from Schusterman President Sandy Cardin about the critical importance of alumni engagement and how the Playbook can help map your organization's path to alumni success.

"Alumni are our strategy."

So said Matt Kramer, Co-CEO of Teach For America, when asked to explain how TFA plans to achieve its ambitious agenda to improve public education throughout the United States. As important a contribution as the more than 40,000 alumni of Teach For America made in their respective classrooms, TFA realizes their potential to advance the cause of education reform is even greater after their initial terms of service expire.

While many choose to continue to work as teachers, others move on to administrative posts, school boards, local governments, state and national legislatures, public policy organizations and other positions of significant influence. From there, they continue the fight, as TFA strengthens its overall effort by adding thousands of corps members to its alumni network every year.

TFA is hardly alone in its appreciation of the importance of alumni engagement. Many institutions of higher education have long been motivating and mining their alumni quite successfully—and they do not do so passively, waiting for their graduates to come to them. Rather, they actively pursue and communicate with their alumni networks using the most effective approaches and the latest in technology, including job searching and career coaching platforms, social media campaigns, casual social gatherings, virtual class reunions, alumni-generated content and more.

And it works. A 2002 study by MIT what the best institutional advancement professionals have been preaching for years: engaged alumni are nearly twice as likely as their unengaged counterparts to support university programs and initiatives, financially and otherwise.

We in the Jewish community would be wise to take note of what the leadership of TFA and many institutions of higher education have demonstrated: alumni represent a tremendous resource, and we should be devoting time, effort and resources to keeping them engaged, just as we do to attract them in the first place. The alumni of all of the educational and experiential programming we work so hard to deliver are the lifeblood of the Jewish community, and it is imperative that we recognize and treat them as such.

After all, look around at the people who lead us and, invariably, you will see a day school graduate, a past participant in a youth group, a former camper or a Hillel activist during college. Others are people who had different but equally transformative experiences; they went on a Birthright trip, they were part of a Jewish leadership development program, they did volunteer work with a Jewish service provider or they pursued social justice with one of our many issue-oriented Jewish organizations.

Where would we be today if we had not kept in touch with alumni and encouraged them to remain active in our community? We would be at a tremendous disadvantage because these are the people who feel the most excited, empowered and passionate about shaping a vibrant Jewish future.

And today, we need more of these people than ever. We are living in a time of immense challenges for our people, for Israel and for our broader community of nations. There is no better time than now to look to a new generation that has the potential to turn the tide of fear and exclusion to one of peace, diversity, strength and equality.

Our alumni are a huge part of that generation, and they need our support to help keep our community growing and thriving. They need ongoing and interesting opportunities to stay connected. They need to feel inspired and motivated. They need to be valued as leaders capable of ensuring a brighter future for us all.

If that is the goal, the challenge is creating an effective, sustainable alumni strategy. Like many of our peers and colleagues, our Foundation has spent years working to support outstanding programs and experiences that prepare participants to be leaders in the Jewish world and beyond. Yet, we found that while we had become adept in developing meaningful “entry” experiences, we were perplexed by planning for the day after. Once participants complete their programs, what happens next? We often found ourselves asking our partners why their follow-up with past participants did not seem as strong as their core programming.

It was not until we began building initiatives like ROI Community, REALITY and others that we fully understood the difference in strategy and expertise that successfully accomplishing these distinct goals requires.

We also saw just how few resources exist to help navigate this crucial challenge. And so, in 2013, we offered a five-part webinar series on alumni engagement in partnership with the Jim Joseph Foundation. We were astounded when hundreds of professionals signed up throughout the course of the series and knew we had tapped into an important need that demanded further exploration.

We began delving into existing research, identifying key trends, speaking about this topic with experts and practitioners in the field, developing deep-dive case studies on a number of organizations with successful alumni communities and drawing lessons from our own work and that of our partners.

We are excited to share our learnings with you here, in the form of this Alumni Playbook. We have designed it as a practical, hands-on toolkit to foster discussion and action, whether you are just starting to think about your alumni or you are a veteran in the space looking to revitalize your alumni community.

The Playbook includes:

Best practices to help you build an effective alumni strategy; an alumni programming “**idea menu**,” which provides suggestions for high-impact programming; **case studies** that exhibit seven organizations’ vibrant alumni communities; a **toolkit** to provide you with additional resources and reading material; and a **discussion guide** to help you engage your stakeholders in the conversation.

We have also provided an alumni programming matrix to guide your thinking as you progress through the Playbook. The goal is to move your community into the upper-right quadrant of the matrix, in which you are operating impactful programming that meets both your goals and your alumni’s interests.

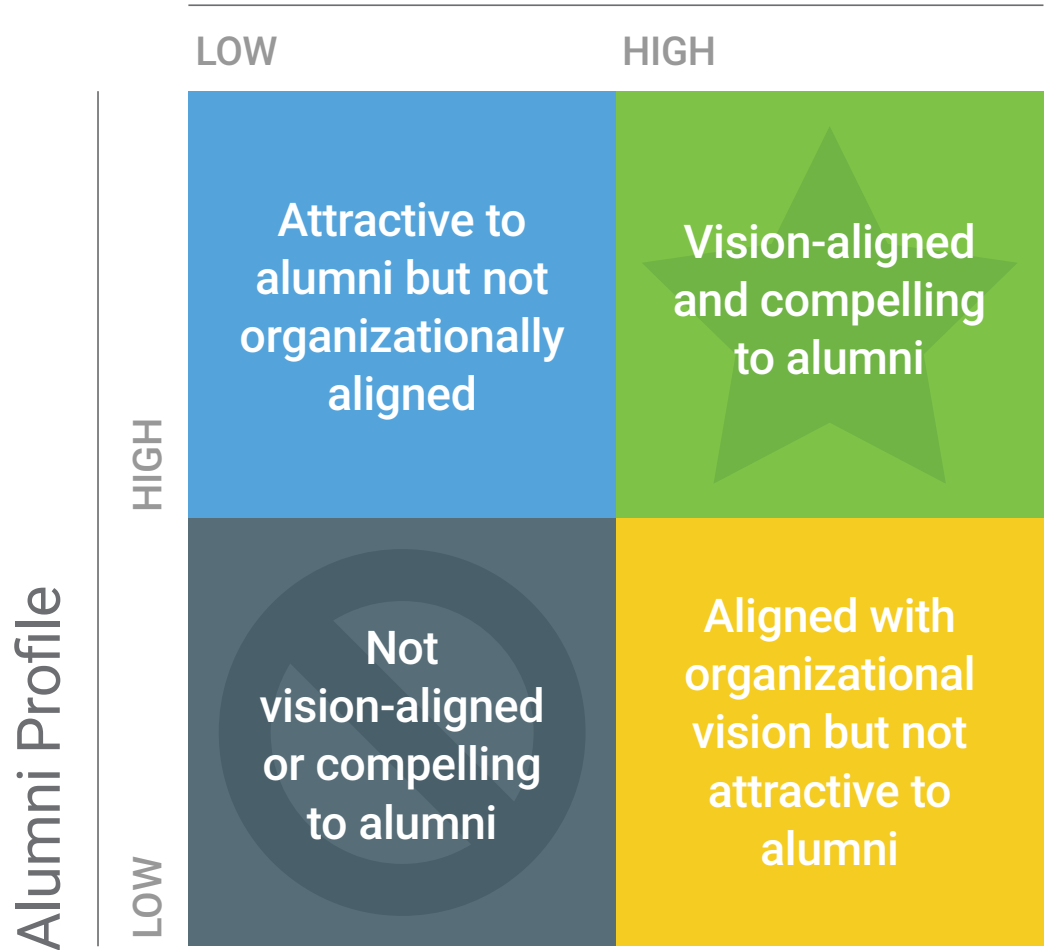
One lesson we hope the Playbook makes abundantly clear is that there is no one-size-fits-all approach to alumni engagement. A successful strategy should reflect the core experience and should naturally differ from community to community. There is no secret formula hidden in these pages. Instead, we hope to offer you a foundation upon which to build an effective strategy suited for your alumni. To that end, I invite you to be in touch with our team if you have ideas for ways we can continue to expand and improve upon the Playbook to the benefit of our organizations and our community as a whole.

After all, the Jewish landscape is changing, and our approach must change with it. Our alumni communities are filled with passionate young people who champion our shared values—and the activation of these networks represents an incredible opportunity to shift our attention from past to present, advance our missions and shape our future in positive and powerful ways.



Sanford R. (“Sandy”) Cardin
President, Charles and Lynn Schusterman Family Foundation

Organizational Mission



A photograph of two women looking at a screen, overlaid with a semi-transparent orange filter. The woman on the left is wearing a lanyard with a badge that reads "Rebecca Shafron" and "The Jewish Federations of North America".

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Step 1: Create a Vision

- » **Review your vision for change.** Creating an engaging and ongoing community can be crucial for the long-term success of your mission. To determine whether and to what degree alumni programming is compatible with your objectives, you must reflect on your theory of change: the particular set of processes you believe will best enable you to achieve your desired social change. If you hope to inspire individuals to pursue a particular mission after the completion of your program or event, then investing in alumni programming is essential to achieving that objective.
- » **Clarify your purpose.** Once you conclude that maintaining a strong alumni community is an important component of your theory of change, clarify the particular purpose your alumni community will serve. Many organizations focus on alumni engagement to expand their reach and foster alumni's continued growth. Ideally, your strategy will utilize programming that sits at the cross-section of these two goals. Not only will this approach increase your overall impact, but by empowering your alumni to take action, they will be more willing to give back to your community through time, talent and financial support.
- » **Set the stage for developing a strategic plan.** After clarifying the purpose of your alumni community, you will need to **develop a strategic plan** outlining your vision for alumni programming and your approach to making it happen. You may want to establish an internal taskforce, drawing on the alumni themselves to help set the alumni vision. If you choose this course, be sure to convene groups around specific questions, challenges and decisions, rather than abstract goals. It may be best to recruit individuals to a short-term, time- and task-based committee, rather than create a formal management structure for your alumni community. For more on how to engage your alumni, see **Best Practice #2: Get to Know your Alumni**.

"Much of what we do is engage our volunteers in a constant dialogue-- what we call strategic planning--about the values that we share, our mutual expectations, and ensuring that we match their gifts of time, talent and treasure with the mission at hand."

MARK DOLLHOPF
Executive Director,
Association of Yale Alumni

QUICK TIP

Many of the organizations that we highlight have engaged with consultants on their alumni programming. While utilizing a consultant can be highly effective in developing an alumni programming initiative, it is not essential to your organization's success. You can create a vibrant community by empowering your alumni to help set the agenda--they are your best consultants, after all!--and develop relevant, valuable in-person and online opportunities.

Step 2: Get to Know your Alumni

» **Maintain up-to-date contact information.** To create an alumni community, you need to be able to reach your alumni. Maintaining an up-to-date database of your alumni's contact information is of vital importance and can be a greater challenge than you might anticipate. Young people, in particular, change their geographic location quite frequently and often switch preferred communication platforms. Communication is becoming more social and mobile, and you should meet your alumni where they already are rather than trying to entice them to a new platform that you create. It is crucial to have an up-to-date [privacy policy](#) and to store your alumni's information in a secure database where you can ensure their privacy. Once this system is in place, obtain alumni's information and connect with them across various social media platforms. Ask your alumni for their:

- » Email addresses
- » Facebook page URLs
- » Cell phone numbers
- » Twitter handles
- » Home addresses
- » Instagram names

» **Keep tabs on your alumni.** In addition to gathering your alumni's contact information, you might also want to collect data on them and track their life changes. You can rely on in-person conversations, phone calls and social media to learn about significant milestones, such as marriages, births, new jobs, moves and other key life events. Offer support as appropriate and use these life events to serve as organic opportunities to stay in touch with your alumni. Make sure you systematically track this data either by using specialized customer relationship management (CRM) software, such as [Salesforce](#), or even through a basic Excel spreadsheet.

"[The Association of Yale Alumni] has gone through a remarkable transformation in the past 10 years. Alumni engagement has tripled. You can change the dialogue when you engage people in the strategic programming."

MARK DOLLHOPF
Executive Director,
Association of Yale Alumni

"Once you know your data, have the measures you're pursuing and have a data system that allows you to track it, the next step is really utilizing that data and building program models and evaluations based on those long term goals so you're not managing via anecdote or hunch. A lot of the things that we've learned from studying our alumni data have not been intuitive."

ANDREA PURSLEY
Executive VP of Alumni Affairs,
Teach For America

» **Engage your alumni to set the agenda.** While developing your alumni programming, it is of the utmost importance to do research on your alumni and involve them in setting the agenda. Find out who they are, where they live, what they care about and how they would like you to engage with them. Maintain open and regular **channels of communication** with your alumni and frequently solicit their input and feedback on alumni programming and initiatives. You can ask your alumni for feedback through in-person conversations, email, social media and surveys. Keeping in frequent contact is the best way to identify growing trends and interests. The results of this feedback may surprise you and may help you identify key gaps that you can fill through your alumni programming. Effective ways to incorporate your alumni's input into your program development include:

- » Inviting a select group of alumni to help you develop your strategic plan for alumni programming;
- » Creating focus groups to develop program ideas; and
- » Surveying participants before you launch programming to gauge interest, and then again after programming to evaluate a program's success and to learn how it can be improved. There are several free tools, such as **Survey Monkey** and **Zoomerang**, that will allow you to design online surveys.

QUICK TIP

There are many strategies for gathering alumni contact information, and the best approach is to incentivize them by offering prizes that are relevant to your mission:

- Organize free events for alumni and require their contact information upon admission.
- Offer an online raffle for a relevant prize and ask for contact information on entry forms.
- Create friendly competition among different alumni cohorts or geographic location-based clusters to update their contact information and offer a prize to the winning group.

Step 3: Build Strategic Programming

- » **Identify vision-aligned intersection points.** Now that you have reflected on your theory of change, clarified the strategic role alumni engagement will play in achieving your mission and gathered key information on your alumni, it is time to build strategic programming where your values and those of your alumni intersect. Intersection points will be opportunities that appeal to your alumni's interests and will also further your mission (take another look at our [alumni programming matrix](#) as a refresher). Based on the feedback you receive from your alumni, try to identify opportunities to provide high-impact programming and resources that will empower them to pursue your shared vision.
- » **Fill gaps in the space.** Based on our research and experience, the most useful and enticing programming occurs when an organization recognizes existing gaps in a vision-aligned space and creates new programming and opportunities in these areas. Now that you have been collecting data from your alumni, pay close attention to their goals and the opportunities they are missing. You may be well-positioned to provide unique experiences for your alumni that they could not receive elsewhere and will help them move forward in pursuing their ambitions.
- » **Take a multipronged approach.** There is no "one-size-fits-all" approach to alumni programming. Create offerings that are unique to your community and alumni's shared vision, as well as ones that create multiple touch points. For example, identify ways to encourage alumni to update their contact information and offer programs that are designed to appeal to different interest groups. Remember: building programming is an iterative process—what works for some may not work for others—so you should be open to assessing and refining your offerings. If you create multiple offerings, chances are that individuals in your audience will find at least one option appealing.

"Whatever you do needs to be for the benefit of alumni and not the organization. If you're doing any programming, any asks, it has to be for the benefit of furthering their goals and enriching their understanding of what it was that you were trying to teach them in the first place."

ANGIE ATKINS

Director, Wexner Heritage Alumni

QUICK TIP

When trying to implement a new program or initiative, identify a few early adopters, invest in these individuals, and build community around these leaders. Your investment will likely yield high dividends.

- » **Use our alumni programming idea menu.** Based on our research, we have identified a list of **top alumni programming ideas** that many successful alumni communities utilize. We encourage you to use this framework as a launching pad for identifying specific programming that would suit your alumni community. Select from the menu to build your ideal “spread” of engaging alumni initiatives.

- » **Build capacity within your alumni.** **Establishing the proper infrastructure** is essential to executing strong alumni programming. Beyond your own organizational capacity, you should empower your alumni to take action and drive the agenda. This will serve the dual purpose of expanding the capacity of your alumni community beyond your existing resources and providing them with valuable leadership opportunities. Consider the following actions when developing your alumni infrastructure:
 - » Ensure that you have support from the leadership team of your organization prior to implementing any initiatives;
 - » Appoint an alumni coordinator to drive the alumni programming, either by hiring a full-time position (if you have the capacity) or by creating a volunteer or internship position;
 - » Appoint a few dedicated alumni leaders in different regions to spearhead alumni initiatives; and
 - » Provide alumni leaders with ongoing support.

- » **Establish proof of concept.** Start small and pilot your programming to get proof of concept before expanding it. Some programs and approaches will be more successful than others, and you should not feel compelled to continue programming that does not meet your expectations. Be willing to scrap some initiatives and focus more of your resources on the ideas that resonate with your community. And always remember to continuously solicit feedback from your alumni: Maintain open channels of communication with them, listen to their thoughts and adapt your programming to meet their needs.

QUICK LOOK

Teach For America noticed a trend among their alumni; those who were interested in school leadership in rural communities almost always left to become principals in urban areas. After further digging, Teach For America learned that the alumni would have stayed if they had access to best-in-class training in rural communities. In response, Teach For America built the Rural School Leadership Academy. While the cost per participant is not insignificant (~\$5,000 each), it is far less than the cost of recruiting, training, and supporting a corps member for two years. This program has led to dramatic results in terms of retention of alumni in rural communities and the school leadership pipeline in these communities.

Step 4: Measure, Iterate and Innovate

- » **Establish achievable metrics.** Developing alumni programming will require an investment of your time and resources. It is important to ensure that your efforts are worthwhile by establishing in advance the criteria that you will use to evaluate the success and measure the impact of your programming.
- » **Run pre-program cost analysis.** Prior to launching a program, it is crucial to run a cost analysis to ascertain the funds it will require and to determine whether you have room in your budget to absorb the cost.
- » **Systematically track data.** Once you launch an initiative, begin tracking and recording all data. This information should be measured across the pre-established metrics. As a general guideline, your measurements should assess participation rates, cost, participant satisfaction and overall impact. As previously stated, **maintain open channels of communication** with participants in order to solicit feedback from your community. Conducting surveys prior to and following events and programs can also be an extremely effective tool to help you evaluate your success.

We measure a good organization based on the relationship between the organization and the volunteer, but we measure a great organization based on what the organization does to change lives and the world at large."

MARK DOLLHOPF
Executive Director,
Association of Yale Alumni

"For each of the new fellowships, we have a common set of metrics and a differentiated set of metrics. On the common set of metrics, we're looking at alumni culture impact. The differentiated metrics are more impact-based."

ANDREA PURSLEY
Executive VP of Alumni Affairs,
Teach For America

- » **Perform post-program cost-benefit analysis.** Following the completion of an event or program, perform a cost-benefit analysis to determine whether the program was worth its price. Determine the cost per participant, whether the overall results justified it and whether your resources could be better allocated elsewhere.
- » **Evaluate your results and adapt as necessary.** Designing your alumni programming should not be a static process, but an evolving one that requires constant communication with your alumni community and a willingness to adapt and respond to their interests. After completing a cost-benefit analysis and overall measure of the success of the program, you may find that some programs were far more successful than others, and you may want to adjust your alumni strategy accordingly. If you launch a pilot program that does not yield positive results, do not be afraid to cut your losses and focus your resources on other more successful programs. You will be much more likely to achieve the results you desire and sustain a satisfied, vibrant alumni community.

"I came in with a ton of energy and my colleagues were incredibly supportive of me and didn't make me feel badly when I failed ... they were willing to give me the support that I needed and I was so grateful. Trying about 30 different things, 15 of them hit the sweet spot."

ANGIE ATKINS

Director, Wexner Heritage Alumni

Step 5: Maintain a Lifelong Community

- » **Build a lifelong community from the start.** From your first interaction, begin instilling an expectation that participants are joining a lifelong community. By fostering a sense of belonging from the outset, individuals will be more likely to remain involved as alumni once their initial program has concluded. Individuals who feel they are a part of a vibrant community will be more invested in and connected to your organization, and they will be more willing to give back by volunteering their time and making financial contributions.
- » **Integrate the community.** Your alumni community should not consist of disconnected factions from assorted cohorts and programs, but rather a diverse, integrated group in which alumni and current participants communicate frequently. By doing so, you will strengthen the sense of community among your alumni and you will tap into your most valuable resource—your alumni themselves!
- » **Incorporate alumni into your community.** There are many ways to ensure that alumni feel like a central and valuable part of your community. Ideas include:
 - » Establish a mentoring program that matches alumni mentors with current participants;
 - » Utilize veteran alumni to create unique learning opportunities for younger alumni;
 - » Invite select alumni to serve on your organization's board; and
 - » Involve alumni with the recruiting process for your programming by providing them with the proper resources to conduct alumni interviews, spread information on social media or host information sessions.

"From the first moment of communication from your organization, there should be a cohesive message that is laced all the way through; that this is a lifetime journey, an attachment to a serious and worthwhile network, and a huge opportunity."

ANGIE ATKINS

Director, Wexner Heritage Alumni

QUICK TIP

The CORE Group's study of the University of Virginia's alumni giving over 20 years demonstrated that gifts from million-dollar donors began at very modest levels and grew consistently and rapidly over time. The average first gift was \$255!

- » **Foster a culture of giving.** Fundraising is an important component of most alumni strategies. However, it should serve as a piece of the larger alumni engagement strategy, rather than the focal point. Alumni show interest in giving back to an organization if they feel like a valued member of a community that they care about and that reflects their values. It is important to foster a culture of mutual giving from the onset of an individual's involvement with your community. **Research** by organizations such as the CORE Group and MIT has shown that young alumni giving can prove valuable in the long run and keeping your alumni engaged is crucial to receiving their support.
- » **Demonstrate your gratitude.** Express your thanks to your alumni for giving their talent, time and gifts to your organization. Ensure that your appreciation for your alumni's support is demonstrated at every level.

QUICK TIP

Make giving fun. Younger donors tend to be more results-oriented in their giving and will want to know the specific impact their giving will have on your organization. Make giving "fun" by creating innovative, goal-specific campaigns through social media or instilling friendly competition between different cohorts of alumni. You could also explore different models of giving, such as giving circles, that make the experience more collaborative and can foster substantive discussions on critical issues.



IDEA MENU

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Step 1: Communication

Maintain regular and ongoing communication with your alumni. In your approach to alumni communication, strive to be interactive and engaging across multiple channels. Focus on delivering interesting and valuable content that clearly and consistently conveys your mission and values. You should also facilitate modes of communication among members of your alumni community.

- » **Create forums for conversation.** Conversation between the members of your alumni community can be incredibly powerful. No matter the channel—through blogs, listservs, social media groups or in-person communication—create user-friendly forums that facilitate conversation among your organization’s alumni and provide them opportunities to share their diverse perspectives on key issues, discuss shared experiences or develop new ideas. If these conversations address sensitive topics, consider using private groups or listservs to protect privacy and foster more open and honest engagement.
- » **Tap into social media.** Aim to meet your alumni where they are by creating an active presence on social media to connect with alumni and connect them to one another. Building virtual communities is a great way to keep your organization on your alumni’s radar and keep your networks alive. Social media can help you keep tabs on your alumni’s activities, create a forum for them to communicate with one another and alert them to updates and new events. Currently, the most popular social media platforms are Facebook, Twitter and Instagram, but new platforms are gaining popularity all the time. While you do not have to be on all platforms—especially if your capacity to maintain them is limited—it is important to establish a presence on the platforms that your alumni use most frequently.

» [Resources for Setting up Social Media](#)
» [Social Media Basics](#)

“Going through existing peer networks is the most effective way to get people to do things. For maximum engagement, we work through existing networks and we invest in a few engaged leaders.”

DAR VANDERBECK
Managing Director of Social Innovation,
Teach For America

“We have an amazing blog that we started two years ago (WexnerLEADS). It’s a real platform; a watercooler for people’s ideas, for incubating, and finding each other. There are also social media platforms that are alumni-driven and very alive.”

ANGIE ATKINS
Director, Wexner Heritage Alumni

» **Establish and maintain alumni-centered publications.** Create newsletters or magazines that provide relevant updates and opportunities, establish a sense of pride in the community and inspire your alumni to maintain their association with your organization. Share success stories, information about your organization’s activities, important milestones in your alumni’s lives and articles on relevant topics –and always encourage your alumni to provide content and share ideas. Here are a few examples of successful alumni publications:

- » [Teach For America Alumni Magazine](#)
- » [Bronfman Alumni Magazine](#)
- » [ROI Newsletter](#)

“The most important part of our mission is conveying values from one generation to the next, and the story we tell is the story of people who come together to give back. We do this through the telling of stories of talented alumni and their ability to change lives. It’s how we affirm the meaningful work that they are doing.”

MARK DOLLHOPF

Executive Director,
Association of Yale Alumni

Step 2: Leadership and Development Opportunities

Leadership and professional development opportunities are often the most compelling facet of alumni programming and can be mutually beneficial for your alumni and your organization. You could profit from implementing one or more of these ideas:

- » **Share relevant opportunities.** Connect alumni with relevant career and leadership opportunities. A great way to **spread** this information is through online opportunities boards, e-newsletters or social media.
- » **Offer career guidance.** Offer your alumni ongoing career mentoring with staff and qualified alumni, including opportunities for ad-hoc career advice or interview preparation. Consider offering discounted professional coaching sessions.
- » **Create mentoring opportunities.** Create a way for younger alumni to connect with and learn from veteran alumni who are established in a field of interest.
- » **Host networking events.** Organize networking opportunities for individuals from multiple cohorts and provide them with access to veteran alumni.
- » **Form strategic partnerships.** Try to form partnerships with relevant graduate schools, employers and fellowship programs to facilitate your alumni's career progression.
- » **Offer candidate endorsements.** Offer your alumni endorsements or recommendations for positions and fellowships, as appropriate.
- » **Boost your alumni's leadership platform.** Help members of your community get speaking engagements and offer to subsidize their attendance at relevant conferences.

"One thing that we have learned over the past few years is that incremental investments in the ongoing personal, professional, and collective leadership of our alumni can have a transformational impact."

ANDREA PURSLEY
Executive VP of Alumni Affairs,
Teach For America

QUICK TIP

Though you should always strive to maintain a fluid and diverse alumni community, there are also distinct advantages to establishing alumni cohorts. As long as cohorts are not kept wholly separate in all of your alumni programming, this type of group structure can boost engagement by fostering unity and belonging within individual cohorts and friendly competition among different cohorts.

» **Offer micro grants.** Offer your alumni opportunities to apply for small funding pools to attend conferences, speak at events, participate in professional development training or launch their own initiatives. This will allow you to keep in touch with alumni, track grant-making trends and create new opportunities around these trends. It also enables you stay up to date on your alumni's interests and approach them in a more personalized way.

» **Create your own programs.** **Designing your own** leadership programming can be the most challenging—but impactful—piece of alumni enrichment. As your organization matures and your alumni begin to outnumber your current participants by a significant margin, your organizational focus may shift to the long-term results of your alumni's work. Some high-level strategies for developing compelling, high-impact programs are:

- » Survey your alumni to learn about their interests, ambitions and needs;
- » Identify key trends and need gaps; and
- » Create strategic programming that will fill these gaps and empower your alumni to achieve your shared vision. We recommend returning to our **best practices** for further guidance.

Celebrate your alumni's success. Award alumni for their outstanding work and publicize their successes to the rest of the community, presenting them as positive role models for others and demonstrating the efficacy of your core programs. Teach For America and The Association of Yale Alumni both offer alumni awards:

- » **Teach For America Alumni Awards**
- » **Yale Alumni Awards**

"Our entire approach across all awards that we give at Teach For America is that it's really not about naming a winner: the people who are selected as the finalists are the winners. We try to celebrate the finalists publicly as winners. We are committed to building a "finalist experience" that includes significant learning, development and coaching...at the end of day we're about building the leadership of our alumni and everything we do programmatically (including awards) is oriented around that principle."

NAYA BLOOM

**VP of Alumni Leadership Development and
Social Innovation, Teach For America**

Step 3: Learning Opportunities

Learning opportunities are a popular and impactful form of alumni programming: studies have shown that individuals of all ages are seeking increased opportunities to expand their knowledge. By creating educational programming on topics relevant to your organization’s mission and offering them unique resources they cannot find elsewhere, your alumni will hone their relevant skillsets and be better equipped to pursue mutually desired change.

- » **Provide practical and compelling content.** It is essential to provide educational opportunities that your alumni find appealing enough to actively pursue. Begin by soliciting feedback from alumni to understand the topics they want to learn more about, speakers they want to hear from and educational initiatives they would like to lead themselves. You can leverage educational content you are already using in your core programming, encourage alumni to share content in their areas of expertise and offer training opportunities that provide them the skills and resources to educate others on topics relevant to your organization.
- » **Offer a diverse array of opportunities.** A good starting point is to offer alumni access to in-person lectures, master classes or online webinars in the following areas:
 - » Alumni interest areas;
 - » Issues related to your organization’s mission;
 - » Topics in Jewish learning; and
 - » Relevant current events.

“At Wexner we want people to go out and be better leaders and serve the Jewish world more thoughtfully, more creatively, and more effectively, and serve beyond the Jewish world. That’s what we gear our programming to.”

ANGIE ATKINS
Director, Wexner Heritage Alumni

QUICK TIP

Offering online and virtual education opportunities is a great way to build community across alumni of different regions. Video platforms provide intimacy, despite geographic distances, and greater ease for those who may not be able to attend in-person events.

Step 4: Volunteer Opportunities

At the heart of all non-profit organizations is the call to service. You have already selected leaders and begun training them to change the world for the better, and the alumni phase is an organic time to continue this call to action. Your alumni are likely searching for meaningful ways to give back to their communities or volunteer for causes that are important to them, and by offering them opportunities that meet those needs, you can effectively draw individuals into your community, strengthen the bonds within it and advance your broader mission.

- » **Make volunteering social.** Recent [findings](#) suggest that, among young people, “having friends who volunteer regularly is the primary factor influencing a young person’s volunteer habits.” The bottom line: making volunteering a social experience for your alumni can afford you even greater success at attracting participants to your programming. Allow your alumni to set the agenda—solicit their feedback about the causes and organizations they care about and the types of volunteer opportunities that appeal to them. Even better, take it one step further by encouraging them to organize their own volunteer opportunities. This approach captures the attention of your audience, empowers them to be proactive and lets you build capacity from within your community.

“Too many organizations focus narrowly on the transactional – what I provide to my alumni and what they give back to me. What is important is what I have passed on to my alumni and what have they passed on to the world.”

MARK DOLLHOPF
Executive Director,
Association of Yale Alumni

» **Offer an array of opportunities.** Below are a few general categories of volunteer opportunities that require varying time commitments by your alumni and resources from your organization.

- » **Site visits.** Organize volunteer events with partner organizations on a weekly, monthly or quarterly basis, based on interest from your alumni. Rotate volunteer events across different partner organizations or set up ongoing relationships with organizations your alumni can use to volunteer regularly.
- » **Service trips.** Based on your organization's capacity, organize service trips of varying length (for instance, a trip could last three days or an entire summer), and partner with organizations that already offer this kind of programming.
- » **Alumni activism programs.** Create programs that empower your alumni to be activists for causes that align with their interests and the mission of your organization.
- » **Online volunteering.** Encourage your alumni to volunteer their time and talents through online platforms such as www.skillsforchange.com.

QUICK TIP

According to DoSomething.org, 76% of people whose friends volunteer regularly also participate in volunteer work!

Step 5: Alumni-Driven Opportunities

Two dominant themes of successful alumni programming that we have identified are: 1) Creating programming that is customized to resonate with your alumni; and 2) Empowering your alumni to be leaders in your community. With these concepts in mind, consider establishing a framework that your alumni can use to design their own vision-aligned programming.

- » **Establish a Do-It-Yourself framework.** As your organization grows and matures, the composition of your alumni community will become increasingly diverse. Alumni at different stages of life and levels of desired time commitment will show interest in different types of opportunities. By empowering them to create and engage in specific, “Do-It-Yourself” (D-I-Y) programming, you can meet the wide-ranging needs of your alumni community.
- » **Empower niche interest groups and geographic cohorts.** A Do-It-Yourself approach offers creative ways to meet the demand for specialized alumni programming that you may not otherwise have the capacity to offer. Programs that are created and organized by alumni themselves present compelling options for niche interest groups or individuals in cities with smaller alumni presences. For example, providing alumni with the resources to form their own gatherings, giving circles or discussion groups can be an effective way to forge connections in your community and ensure that your message is consistently deployed. You may not have the capacity to focus on these groups, but an effective D-I-Y framework allows you to significantly expand your reach at a low cost.
- » **Publicize eligibility criteria.** To effectively drive this model, establish criteria for the types of opportunities you are interested in supporting, the resources you want to provide and the qualifications your alumni must meet to receive these resources.

“You should frame the organization as a launchpad for alumni’s own ideas... Create volunteer armies that can be creative with programming so that the organization itself is not doing all of the heavy lifting on alumni experiences.”

DAR VANDERBECK
Managing Director of Social Innovation,
Teach For America

“A real priority that we’re working on going into next year is digital resources that empower alumni to create communities for themselves... We’re doubling, tripling down on virtual conversations hosted by alumni, for alumni...and giving people the tools to be able to make things happen vs. [the organization] always being the maker of things happening.”

ANDREA PURSLEY
Executive VP of Alumni Affairs,
Teach For America

Step 6: Social Opportunities

Do not discount the value of the most traditional form of alumni programming: social events. Your alumni strategy should revolve around fostering a strong and vibrant community that reflects your values, and individuals will want to belong if they view it as a fun way to engage in social activities with old friends, meet other like-minded peers and provide opportunities that reflect their interests.

- » **Know your audience.** To ensure that your social events are successful, you need to **know your audience**. Communicate with your alumni, learn their likes and dislikes and identify individuals who are willing to volunteer to help spearhead social initiatives.
- » **Divide and conquer.** The interests of your alumni will likely vary across geographic region and age group. By creating social activities that are specialized to these demographics, you will have the flexibility to tailor programming to the interests of different groups. Offering regional alumni events can be a great way to bring together intimate communities in different geographic areas and will also reduce costs by eliminating expenses for travel and accommodations.
- » **Plan strategically.** Develop programming that will minimize costs and maximize impact. Take into account the budget and time needed to plan your events and develop your programming accordingly. Given the effort and resources that event planning requires, it is helpful to create events that can be easily replicated in the future. Encouraging alumni to help with the planning, promotion and execution of an event can reduce your workload and ensure its success. Possible alumni social events include Shabbat dinners, holiday celebrations, service activities, in-person lectures and online learning opportunities (such as webinars or informal virtual chats).

QUICK TIP

Look for offerings of other organizations that already attract your alumni (e.g. large special interest conferences). Take advantage of this opportunity by organizing a delegation of your alumni to attend the conference and coordinating small events or meetings at these gatherings.

A photograph of three young men standing in front of a large window, looking out at a cityscape. They are all smiling and appear to be in a friendly conversation. The man on the left is pointing towards the window. The man in the middle is looking towards the man on the right. The man on the right is gesturing with his hand near his chin. They are all wearing blue lanyards with ID badges. The image is overlaid with a semi-transparent teal filter.

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ROI COMMUNITY

Case Study



Challenge

ROI Community, an initiative of the Charles and Lynn Schusterman Family Foundation, is an international network of activists and changemakers who are redefining Jewish engagement for a new generation of global citizens. ROI Community members channel a diversity of perspectives, skills and interests toward a shared passion for advancing ideas and partnerships that will strengthen Jewish communities and improve society.

Through its capstone Summit and an innovative suite of ongoing opportunities for professional development, networking and financial support, ROI Community empowers its members to take an active role in shaping the Jewish future. Today, ROI Community members across the globe are finding new ways to engage wider audiences in Jewish life.

In July 2006, ROI (not yet known as ROI Community) held its first global Summit in Jerusalem, where it brought together 120 young Jewish leaders, innovators and activists for five days of intensive networking, skill building and professional development.

Five years and 500 participants later, program leadership reflected on the future direction of the organization. To that end, ROI invited 120 of its members to participate in a large focus group. Through this process, staff realized that they did not want ROI Community members to think of themselves as having gone to an ROI event, but rather as being a part of a vibrant ROI network. But how could the program transition from a five-day Summit into an ongoing community?

Approach

In 2010, ROI embarked on a strategic planning process to achieve this objective, starting by identifying the unique components that had made the program successful and reflecting on the organization’s theory of change.

From the start, ROI’s approach has relied on the multiplier effect: the belief that investing in a select group of talented changemakers can result in a much broader impact on the global Jewish community. During the 2010 strategic planning process, the organization articulated its vision by developing the concept of “a thousand connecting a million”—in other words, becoming a network of a thousand individuals who are collectively connecting millions of people to Jewish life, to Israel and to Jewish values.

To take this vision to the next level, staff modeled the community after what network theorists call a “global strategic network”: ROI would become a community of reciprocity, where its members share advice, collaborate on projects and serve as strategic resources for their peers. ROI’s capstone Summit and Community would serve as catalysts for creativity and innovation among members, producing a ripple effect that could transform broader Jewish life.

After reflecting on their mission and developing their theory of change, leadership clarified the primary objective of ROI: to create environments for its members to connect and create together. This purpose served as the foundation from which ROI began to expand its programming, as well as the lens through which it examined its work.

ROI realized that the first step towards this goal was creating an appealing brand, a clear and consistent message to its members about what the organization represents. After

completing its strategic planning process in 2012, ROI launched a new brand under the name ROI Community. From that point forward, the ROI Summit became the gateway into the ROI Community—a five-day gathering designed to outline the activity and behavior expected of its members year-round. Rather than producing “alumni” of ROI, the Summit would serve as the inaugural experience for lifelong ROI Community membership.

To build out programming for the 360 days beyond the five day Summit, ROI Community developed a wide range of opportunities and incentives for its members that reflect the organization’s vision and serve as a comprehensive slate of activities for Jewish social activism, entrepreneurship and leadership. ROI Community began offering opportunities in the following focus areas:

Professional Development and Skill Building

- » **Master Classes and Courses:** ROI Community focuses on developing people, rather than projects. With this guiding principle in mind, the organization offered diverse, cutting-edge professional development opportunities to its members throughout the year. From master classes to extended courses, ROI Community gives field experts platforms to relay knowledge and skills in a variety of areas, including fundraising, marketing, branding, communicating, presenting, facilitating and more. The program also offers discounted coaching and mentorship opportunities and assists members in booking speaking engagements and attending conferences.

- » **Conference Delegations:** In 2012, staff began organizing delegations to popular conferences devoted to personal and professional growth. Rather than traveling alone, ROI Community members benefit from attending conferences with other members of their community.

Connecting and Creating

- » **Schusterman Connection Points:** In 2012, ROI Community launched Connection Points, a series of local and thematic peer-led gatherings organized by members of the ROI Community. These gatherings bring together hundreds of passionate, talented young Jews and channel participants' ideas, creativity and enthusiasm into partnerships that build and strengthen ties to Jewish life for themselves and their peers. Connection Points is part of the Schusterman Family Foundation's broader efforts to invest in young leaders and enable them to shape their own Jewish experiences. Connectors receive training, coaching, funding and support through the design and implementation of their Connection Points.
- » **Grassroots Initiatives:** In December 2014, ROI Community introduced its Grassroots ROI Initiatives platform, helping members spearhead their own events to engage local ROLers and the broader Jewish community. This platform enables Community members to organize gatherings or short programs with unique approaches to addressing local topics, engaging peers, gathering key stakeholders or pushing the envelope on what today's Jewish community can and should look like.
- » **Meet-Ups:** ROI Community events and reunions take place around the globe, fostering ongoing connections, friendships and partnerships between members. From organized dinners to reunions at Jewish conferences and general conventions, ROI Community connections continue to flourish all year long.

Innovative Funding Opportunities

- » **ROI Micro Grants:** In 2011, ROI Community initiated its Micro Grants program, offering small stipends that can have macro impact on members' personal and/or professional development. ROI Community members can apply for up to two \$1,000 grants per year to engage in professional development, attend events or conferences, create their own projects or advance their Jewish learning. Originally, ROI Community utilized a traditional grantmaking process; however, it soon shifted to a micro grant approach to reduce competition between members and foster greater collaboration. This program also offers the organization a vehicle for keeping in touch with members and identifying trends across the community—if many individuals are trying to use micro grants for the same purpose, the program can offer this opportunity in a more official capacity, keep track of members' activities and approach ROLers in a more personalized way.
- » **Natan Grants:** ROI Community is committed to forming and strengthening strategic relationships with funders around the world to advance members' initiatives and development. In 2012, the organization partnered with the Natan Fund, a giving circle that inspires young philanthropists to become actively engaged in raising funds for Jewish causes. The collaboration between ROI Community and the Natan Fund strengthens and enhances the work of each organization, and together, they have a profound influence on the Jewish world. This annual grant supports individual social entrepreneurs, community builders and early-stage programs that engage young Jews in Jewish culture in innovative ways.
- » **Indiegogo Partner Page:** Indiegogo is an international crowdfunding platform that empowers anyone, anywhere to raise money for any cause. In 2012, ROI Community became the first Jewish organization to create a Partner Page on Indiegogo. Crowdfunding campaigns run by ROLers can be featured on the [ROI Partner Page](#) and receive discounted platform fees. In addition, the Schusterman Family Foundation offers matching contributions ROLer-led campaigns that align with Schusterman values, are suited for a crowdfunding model and have realistic monetary goals.

- » **Newsletter:** Consistent communication is a key part of ROI Community’s strategy. In October 2010, the organization introduced a bimonthly newsletter that provides interesting and engaging content relevant to the community’s interests. Since the newsletter’s inception, the most popular element has been a robust “Opportunities Section” that connects readers to fellowships, jobs and board positions.
- » **Social Media:** ROI Community seeks to meet people where they are, pinpoint their needs and then meet those needs. ROlors are on Facebook and Twitter, so rather than trying to pull them to the ROI website, staff have created an active presence on social media. They also use Facebook to track ROlors’ activities and identify ways ROI Community can address their interests. Whether it is a Mazel Tov, a condolence or a job opportunity, social media provides ROI Community a better understanding of how it can be of service.
- » **Listserv:** The program also utilizes an active listserv that allows members to easily communicate.

Impact

Note: Case study reflects data through June 2014.

What began as an annual Summit has now become an active, year-round community where Jewish innovators collaborate and offer each other strategic support and advice. In June 2015, ROI Community held its ninth Summit in Jerusalem, bringing together 150 of the Jewish world’s brightest young minds from every corner of the globe and every field of interest to dream big, network and learn from a cohort of talented peers. These individuals join a lifelong community comprised of 1,090 members that comprise 58 countries and 43 languages.

Since adapting its strategy, ROI Community now facilitates ongoing interactions and relationships among its members on a global scale, and from these connections come the ideas and initiatives that strengthen communities and improve society.

ROI Community’s approach has yielded tremendous impact in several key areas:

Professional Development and Skill Building

- » **Master Classes:** In 2014, ROI Community held seven Master Classes with 123 attendees. Class topics included:
 - » 3-D printing and laser cutting;
 - » Film lessons and tips from Jason Wishnow, the mastermind behind the atmosphere of TED Talks;
 - » The theory and practice of social entrepreneurship by Dr. Jonathan Mirvis, a senior lecturer on social innovation at the Hebrew University;

» Decision-making with economist Noreena Hertz; and

» Executive Director of the Taub Center for Social Policy Studies in Israel.

- » **Courses:** In 2014, ROI Community offered four programs that attracted 137 attendees. Some of the multi-day learning opportunities offered to ROlors in 2014 and 2015 included:

» **Facilitation Intensive:** A five-day course about the planning and design of gatherings.

» **Communication Skills Seminar:** A two-day workshop focused on improving key presentation and communication techniques.

» **Adaptive Leadership Lab:** A five-day seminar that pushed participants to question, deconstruct, grapple and grow as they analyzed their own preconceived notions of effective leadership, with experiential learning developed by the Harvard Kennedy School of Government's course on Adaptive Leadership and the Immunity to Change.

- » **Conference Delegations:** Recent ROI Community delegations have attended major international conferences such as SXSW in Austin, Texas; the Salone del Gusto e Terra Madre Slow Food conference in Torino, Italy; Burning Man in Nevada; Midburn in southern Israel and Limmuds worldwide.

Connecting and Creating

- » **Schusterman Connection Points:** Seventeen gatherings took place over the course of the first two years of the program, and 2015 will see another 10 Connection Points around the world. Collectively, these gatherings have impacted over 1,500 participants. The themes of this year's Connection Points include LGBTQ activism, international development, food, art, leadership, social justice and more. For more information on Connection Points, visit: www.schusterman.org/connectionpoints.

- » **Grassroots Initiatives:** Since launching the Grassroots initiative in December 2014, ROI Community members have organized 36 initiatives—some of which saw thousands of attendees.

- » **Meet-Ups:** In 2014, ROI Community held 29 meet-ups and Jewish festival events, attracting 860 total ROlors.

Innovative Funding Opportunities

- » **ROI Micro Grants:** More than 1,500 micro grants have been distributed since 2011, enabling ROlors to take their projects to the next level—from organizing a Chanukah “silent rave,” to hiring a web developer to design a new site, to traveling across the Atlantic to collaborate with a fellow ROlor, the organization supports a wide range of initiatives, events and development opportunities. To learn more about micro grants, visit:

www.schusterman.org/roicommunity/micro_grants.

- » **Natan Grants:** Since the launch of ROI Community's unique partnership with Natan, 15 initiatives have received over \$100,000 in Natan funding, including [Friday Night Lights](#), [Israel Story](#) and [Judaic Tourism](#).

- » **Indiegogo Partner Page:** ROlors have launched 55 crowdfunding campaigns on the ROI Community Indiegogo Partner page, collectively raising over \$650,000. To see all campaigns run through their Partner Page on Indiegogo, head to: <https://www.indiegogo.com/partners/ROIC>.

Communications

- » **Newsletter:** ROI Community's bimonthly newsletter serves as an important piece of its overall strategy, distributing valuable information and updates to its members. ROLers have demonstrated a consistent interest in the newsletter, with an average open rate of more than 50% and an average click through rate of 33%.
 - » **Social Media:** Through its various online channels, ROI Community has engaged thousands of people; for example, during the 2015 ROI Summit, the #ROIcom hashtag was used in 608 posts generated by 145 unique users, reaching an audience of approximately 700,000 with over 2 million impressions (appearances in an individual's social media feed).
-

Between its capstone Summit and it's comprehensive platform for sharing professional development and networking opportunities, ROI Community has created an open and vibrant atmosphere of connection and collaboration that empowers its members to better themselves, their communities and the broader Jewish world.

To learn more about ROI Community, please visit: www.schusterman.org/roicommunity.



MOISHE HOUSE

Case Study



Challenge

Founded in 2006, Moishe House is a pluralistic, international organization that provides meaningful Jewish experiences to adults in their 20s. Through its innovative social experience model, Moishe House provides young Jewish leaders with training, support and resources to create vibrant communities for themselves and their peers.

The center of Moishe House's approach is an open, welcoming home (a Moishe House), where 3-5 young adults, known as residents, live for 1-3 years. Each month, residents plan and host a slate of accessible cultural, religious and social events for young Jews, including Shabbat dinners and holiday celebrations. In return, residents receive a generous rent subsidy, programming budget, educational resources and training. Since its founding, Moishe House has rapidly expanded to 75 houses in 17 countries that engage more than 80,000 program attendees annually.

By 2012, Moishe House had over 300 resident alumni—individuals who had lived in and run Moishe Houses—and the organization was unsure if and how alumni engagement should be integrated into their programming. As the Board considered this question, it reflected on Moishe House's core belief: that the pluralistic atmosphere of the Jewish community is dependent upon a continuous pipeline of opportunities for leadership, learning and involvement in Jewish life, especially in the crucial years following college. As a result, the Board determined that the end of participants' Moishe House residencies would instead be considered the beginning of lifelong Jewish journeys that the organization would continue to support during this transition.

Approach

When Moishe House embarked on a strategic growth plan in 2012, it decided to include a long-term investment in alumni as one of the key pieces of its broader agenda. Feedback from their first external evaluation was clear: when residents move out of a Moishe House, they want to continue their community leadership, but without the intensity of being a resident.

Moishe House's comprehensive model relies heavily on a Do-It-Yourself (DIY) approach to community building, empowering Jewish individuals in their 20s to plan and lead meaningful programming and activities that best suit their specific communities. In the spirit of this underlying philosophy, Moishe House began to experiment with a DIY model for its resident alumni to provide more individuals with opportunities to facilitate peer-to-peer programming. Moishe House wanted to expand the breadth of its programming to enable individuals to create events anywhere, regardless of whether they currently live in a Moishe House.

In July 2012, Moishe House piloted its DIY program, Moishe House Without Walls (MHWOW), in San Diego. Moishe House hired a Director of Alumni Relations to oversee the development of the program and further expanded its proprietary online database, theMintranet, to encompass all Moishe House programs across the globe. In the first five months of the soft launch of Moishe House Without Walls, 52 programs were held and 718 attendees were engaged.

Based on the initial success of MHWOW, Moishe House staff recognized the program's potential to become the centerpiece of the organization's alumni strategy. In preparation to capitalize on this momentum, the Director of Alumni Relations worked diligently to gather and organize Moishe House alumni's contact information during the first few months of the program's soft

launch. The Director also established a protocol to ensure that Moishe House could effectively reach its alumni, particularly those who had expressed interest in continuing their involvement with the organization after completing their residence.

In January 2013, Moishe House officially launched MHWOW and hired a former Moishe House resident to oversee the program's growth and develop the MHWOW program beyond the pilot phase. Moishe House expanded its criteria for eligible MHWOW hosts to include resident alumni around the world, as well as alumni from Moishe House's Learning Retreats and Leadership Development Retreats.

As MHWOW continued to evolve, Moishe House developed a more nuanced understanding of how it could best maximize the program's success. To gain more targeted insight, Moishe House launched a small-scale internal evaluation from the end of 2013 to early 2014 to assess MHWOW's progress. The findings were remarkably positive and led to a larger scale, external evaluation that was completed in early 2015, which clearly demonstrated the strong impact of MHWOW on both the hosts and the participants.

Moishe House found the feedback from its hosts to be particularly helpful in understanding the potential of MHWOW and identifying areas for improvement. Staff worked to implement improvements based on the reported challenges by establishing and publicizing clear guidelines for MHWOW hosts and by executing a major redesign of the Mintranet in May 2014. By June, MHWOW had more than 262 registered hosts across all cities where Moishe House alumni lived.

In addition to MHWOW, Moishe House developed and expanded other aspects of its alumni programming, particularly its suite of leadership development programs. Moishe House began to offer its alumni the following opportunities:

- » Jewish Education Scholarships: Scholarships available to alumni for classes, conferences, service learning trips and other programs that enhance their personal development and Jewish learning.
- » Moishe House Ignite Summits and Learning Retreats: Retreats open to resident alumni to support them in their professional, creative and community-building endeavors. Moishe House covers the cost of alumni’s participation and offers travel stipends.
- » National Alumni Advisory Board: An invitation-only advisory board comprised of nominated resident alumni who advise the organization and serve as leaders in the Moishe House community.

To further support and maintain a strong alumni community, Moishe House decided to take the following steps with regard to its alumni communications:

- » Create a newsletter that includes updates, insights and involvement opportunities;
- » Continuously update contact details by utilizing CRM software and Moishe House’s own online database;
- » Maintain ongoing dialogue with alumni to receive updates on their development; and
- » Connect with alumni through Twitter and Facebook.

Impact

Note: Case study reflects data through May 2014.

By December 2014, Moishe House had already surpassed its goals for its alumni initiatives.

1. Do-It-Yourself Programming

» Moishe House Without Walls (MHWOW):

- » MHWOW has become an increasingly crucial piece of Moishe House’s comprehensive model. From January through November 2014, hosts led 532 MHWOW programs with a total attendance of 5,636. MHWOW increased programming by more than 100% and reach by 96% since the previous year.
- » MHWOW has already begun to have a large impact on the Jewish life of participants. As one MHWOW host in San Diego explained, *“MHWOW has given me the means to develop my own interpretations of Jewish culture and include others in my modern Jewish experience. I have been able to bring together diverse groups of Jews and interested non-Jews in San Diego, and together, we are reinforcing our positive associations with Judaism. Now my friends and I are even more committed to carrying on traditions and spreading Jewish education. Through MHWOW I was able to reconnect to my strong Jewish identity which had been previously been on hiatus.”*
- » Over the next few months, Moishe House plans to build out the program through strategic partnerships with several other Jewish organizations that provide immersive experiences for the same demographic, enabling alumni of other eligible programs to serve as hosts through the MHWOW framework. This collaboration with other Jewish organizations has the potential to strengthen the greater Jewish community from within and expand the MHWOW program.

2. Leadership Opportunities

» Jewish Education Scholarships:

» Since January 2013, Moishe House has provided \$25,314 in scholarships to alumni and MHWOW hosts. Scholarships have been used for a wide variety of opportunities, including the Hazon Food Conference, Tribefest, JDC Entwine trips, Limmuds and the AIPAC Policy Conference.

» Moishe House Ignite Summits and Learning Retreats:

» Moishe House's first Ignite Alumni Leadership Summit was held in August 2014 and attracted 24 former Moishe House residents. In addition to group sessions with special guest educators, participants had access to one-one-one executive coaching and professional headshot sessions. To quantify the skills and knowledge imparted at the Retreat, Moishe House used online surveys that gauged the impact of the event on participants' overall impressions.

» National Alumni Advisory Board:

» What began as a staff-guided advisory group soon transitioned into a peer-driven system as alumni leaders took initiative, engaged with their peers and provided the organization with valuable insight and ideas through multiple feedback channels. This process included their assessment of alumni needs and goals beyond their Moishe House experiences, as well as best practices for engagement and continued communication. As an outgrowth of this effort, two of Moishe House's alumni advisory board members were appointed as co-chairs of Ambassadors Circle, Moishe House's inaugural alumni fundraising campaign.

3. Staying Connected

» By the end of 2014, Moishe House alumni were significantly more connected and invested in the organization:

- » Email newsletter open rates had increased by 13% over the course of one year, from 41.0% in 2013 to 54.3% in 2014, and the number of updates throughout the year had doubled.
- » Retreat participation among alumni had risen from 25 to 62 individuals during this same time period.
- » Alumni significantly increased their financial giving to the organization: between 2013 and 2014, the number of alumni contributions of \$180 or more increased from seven in 2013 to 47 in 2014.

In a few short years, Moishe House has developed a robust alumni program that empowers its participants to become effective Jewish leaders and keeps them engaged beyond its initial programming. Moishe House will continue to monitor and invest in its alumni program in keeping with its primary mission of strengthening the Jewish community.

To learn more about Moishe House's work, please visit their website at www.moishehouse.org.

BIRTHRIGHT ISRAEL EXCEL

Case Study



Challenge

Since its founding in 2011, Birthright Israel Excel (“Excel”) has created a prestigious program that consistently attracts top young Jewish talent and provides them with invaluable business experience that bolsters their careers and strengthens their connection to Israel and Jewish life.

Excel is an elite, year-long fellowship program that begins with a 10-week business internship and educational program in Israel. The program recruits talented Jewish college sophomores, juniors and select seniors who are pursuing careers in business and technology. During the program, each Excel fellow is assigned an internship at a prominent Israeli company with global reach in industries such as finance, venture capital, consulting, hi-tech, bio-tech and social media.

By 2013, Excel had been operating successfully for two years and had grown its alumni base to more than 180 participants (including Israeli Peers). Despite all that Excel had accomplished

through the immersive 10-week Israel experience, the Excel staff believed it was essential to have a strong framework in place for participants upon their return from Israel. Furthermore, another community that Excel felt was being underserved was the growing number of Israeli Peers—the Israeli students and soldiers matched with Excel participants upon their arrival in Israel. As Excel matured, the significance of the Israeli Peers and of the bonds they formed with U.S. participants became apparent. Excel’s leadership came to realize that the Israeli Peers played a crucial role in the Excel experience and that they required additional attention, and as a result, they decided it was time to strengthen its alumni programming. Excel proposed a long-term goal: to establish a social network of 1,000 key business leaders in the Jewish world and in Israel—a network that would allow development of innovative joint programs and ventures for the benefit of Israel and the Jewish community.

Approach

To ensure that Excel alumni maintain long-term business ties with Israel and continue to support the Excel program as they progress professionally, the staff concluded that the development of a robust alumni association was critical.

They decided that they should develop separate programming for their U.S. alumni and Israeli Peer alumni communities, tailored to the specific needs of both groups. Once Excel established a strong network in each location, collaboration between the two groups would be increased. The staff developed a set of action items within the following areas:

1. Develop Alumni Infrastructure

- » Hire Alumni Coordinators in the U.S. and in Israel, who work in tandem to develop alumni programming suited to their regions.
- » Collect alumni information through Birthright’s customer relationship management (CRM) system and update it following all interactions (including conversations, meetings and written correspondence) between the Alumni Coordinator and alumni.
- » Use Facebook for internal correspondence and cross-organizational communications, including alumni discussions and relevant business and social information regarding the U.S. and Israel.
- » Utilize an alumni app called “Keep In Touch” to allow more targeted and intimate discussions among alumni fellows.

2. Empower Alumni in the U.S. as Business and Social Leaders

- » Offer Excel alumni opportunities to participate in the annual Birthright Israel Excel Leadership Conference, the centerpiece of ongoing leadership development and relationship building available to Excel alumni.
- » Create an Excel Advisors Program that connects Excel alumni with role models in North America to continue their personal and professional development. Advisors are charged with advising Excel alumni on topics like career development, involvement in the Jewish community and philanthropy.
- » Institute a quarterly newsletter to better connect Excel alumni, provide community opportunities, highlight programs and projects, and share ideas and best practices. Designate “Excelers” to be responsible for a majority of the content.
- » Continue to offer regional get-togethers, webinars and conference calls, which bring the Excel alumni community together to discuss issues such as anti-Semitism, community service and entrepreneurship.
- » Involve alumni in the recruitment of future Excel fellows.
- » Encourage alumni to staff Birthright trips to Israel.

3. Empower Alumni in Israel

- » Provide opportunities for previous Israeli Peers through the development of the Israeli Peers Alumni Community.
- » Develop a systematic programming schedule and an active community for the Israeli Peer Alumni, effectively providing a platform for the cultivation of Jewish leadership in the business, social and public sectors among its members through continuous partnership with the global Excel community.
- » Develop a committee to connect Excel alumni and Israeli peers through business, current events, social justice and political issues.

Impact

Note: Case study reflects data through May 2014.

In 2013 and 2014, Excel made major headway in building a robust alumni community for its U.S. and Israeli participants by focusing on its three core action items:

1. Develop Alumni Infrastructure

Excel hired an Alumni Coordinator for each region to drive alumni programming.

- » Excel selected a Chairman for the North American Excel Alumni Community and continues to work with four Excel Class Representatives (one from each 2011-2014 Excel class) to serve as lay leaders and guide activities across the country.
- » The organization maintained an active and engaging [Excel Facebook page](#) through which alumni share current events, business ideas and social opportunities on a regular basis.

2. Empower Alumni in the U.S. as Business and Social Leaders

- » Annual Excel Leadership Conference: An extraordinary turnout of 95 Excel alumni (73% attendance rate) came together to attend the Leadership Conference in November 2014, which featured the theme of “Global Connections: Building Business and Community.”

- » Excel alumni were given the rare opportunity to meet with prominent business and Jewish community leaders who have made a lasting global impact. These leaders discussed topics related to business and entrepreneurship, leadership, Israeli business and culture, Jewish identity and philanthropy.
- » As part of an effort to empower alumni to take on leadership roles within the Excel community, Excel provided its participants with tools and workshops to help fuel the next phase of their alumni experience:
 - Excel alumni took part in a Giving Circle Express workshop facilitated by **Amplifier, a network of Jewish giving circles operated by The Natan Fund**. Through this experience, participants discussed their giving values, discovered potential grant recipients in Israel and decided which organization to support.
 - Excel alumni participated in over two hours of small group workshops to determine annual programmatic goals for Excel, as well as “big ideas” to guide them toward their future as a community. From these sessions, they developed a multi-dimensional platform that supports meaningful connections between Israel and the U.S. through business, personal relationships and tikkun olam (repairing the world)
 - Over the course of the conference, Excel alumni created an agenda of alumni-driven opportunities that they plan to pursue as a community during the upcoming year.
 - One Excel alumni participant noted, “Though I generally enjoy the speakers the most at these conferences, I appreciate that Excel is moving more in the direction of alumni leadership. I think this is crucial to ensure the fellowship network’s continuity.”
- » Excel Advisors Program: In October 2014, Excel launched the initial phase of the Excel Advisors Program, connecting business leaders across the country with cohorts of Excel alumni. As of December 2014, Excel had 15 Advisors spanning the fields of finance, high-tech and consulting. Excel alumni have been granted invaluable access to and forged connections with business and community leaders. Similarly, Excel Advisors have had the opportunity to meet with exceptional students, mentor participants and learn about the program directly from enthusiastic Excel ambassadors. The Advisors will meet with Excel cohorts twice a year (in fall and spring).

- » Excel will continue to send a quarterly newsletter driven by alumni content. Following the 2014 Annual Excel Leadership Conference, alumni also decided to create an annual newsletter with Israeli peers to highlight the holistic nature of the Excel experience. The newsletter will feature connection points, inspiring stories and cultural interest pieces.
- » Alumni took a very active role in recruiting and interviewing suitable candidates for the 2014 Excel program—in fact, 50 percent of new cohort participants learned about the program from Excel alums. Excel hopes to further empower its alumni by providing them with tools to create their own information sessions on campus.
- » Following the retreat, Excel selected an Alumni Advisory Board to better promote and execute their initiatives.
- » A record number of 15 Excel alumni staffed trips to Israel during 2014, a demonstration of their increased desire to stay connected to the organization and to Israel.

3. Empower Alumni in Israel

- » In 2014, Excel continued to see considerable development in the structure, activity and direction of the Israeli Peer Alumni Association. The organization started a strategic planning process during the first Israeli Peer Alumni Retreat in February 2014.
- » Approximately 60 participants attended the retreat, bringing many of the 2011 alumni back into the community. The retreat gave participants opportunities to connect with each other, hear from noted speakers and discuss issues of community, innovation and philanthropy.
- » Following the retreat, Excel held several more sessions that focused on formulating a strategy and building infrastructure to execute the group’s 2014-2015 goals. In August 2014, the strategic plan was approved by Excel management.

- » The Israeli Peer Alumni Association has created numerous community events, including retreats, gatherings, seminars and webinars with the U.S. alumni association to connect Israeli and U.S. entrepreneurs. The Israeli Peers have also created “Excel on the Bar,” a series of casual gatherings in Tel Aviv bars where Excel alumni and their friends hear from Israeli leaders about different topics.

In 2015, Excel continues to work with key partners such as the Interdisciplinary Center Herzliya and 8200, an elite IDF intelligence unit, to support the Israeli Peer Alumni program. As Excel enters its fifth year, its alumni community is maturing into a vibrant and active network of young professionals promoting meaningful connections between the U.S. and Israel and throughout the global Jewish community.

To learn more about Birthright Israel Excel’s work, please visit their website at www.birthrightisrael.com/sites/excel.



AVODAH

Case Study



Challenge

Founded in 1998, AVODAH: The Jewish Service Corps develops a network of Jewish leaders working to promote social justice and fight domestic poverty. By engaging participants in service, learning and community building, AVODAH inspires Jewish young adults to become lifelong drivers of social change, with their work for justice rooted in and nourished by Jewish values. AVODAH offers yearlong Service Corps programs in Chicago, New Orleans, New York and Washington, DC, as well as a new nine-month non-residential fellowship program in New York City.

By 2015, after 17 years of programming, almost 800 AVODAH corps members and fellows have managed to touch the lives of approximately 590,000 people living in poverty. An alumni report conducted in 2012 by Dr. Lawrence Bailis, of Brandeis University, demonstrated that in addition to the impact AVODAH Service Corps participants had on their communities, the AVODAH program also had a profound impact on the Service Corps members themselves:

- » 85% noted that the year of service strengthened their commitment to social justice;
- » 85% said that AVODAH helped them find their place in the Jewish community;

- » 88% stated that the year of service deepened their involvement in the Jewish movement for social justice;
- » 90% reported routine participation in Jewish holidays;
- » 91% stated that the year of service helped them build a professional and social network;
- » 75% reported having continued to work in the field of social justice or in the fight against poverty; and
- » 88% emphasized that AVODAH contributed to them getting their current jobs.

Despite AVODAH's significant achievements, in 2012 the staff determined that there was more that could be done. If AVODAH wanted to meet the full potential of its mission to develop and support leaders who would lead the Jewish community's work against poverty, AVODAH would need to focus on its alumni and employ a multi-faceted strategy to address alumni's needs at various ages and stages. As a result of their analysis, they decided it was time to expand the reach of the organization's work through a more proactive approach to their alumni programming.

Approach

Led by the former Director of Alumni and Community Engagement, Rabbi Stephanie Ruskay, the AVODAH staff reflected on the alumni activities they had conducted since 2002. Although Rabbi Ruskay and the rest of the staff believed they had achieved impressive results given the relative youth of the organization and their limited resources, they felt confident that it was time to ramp up their alumni initiative.

Based on their objectives and the results of their previous efforts, the AVODAH staff identified their key areas of focus. The first would be to develop AVODAH’s alumni organizational infrastructure to better enable alumni, individually and collectively, to connect with one another and develop as leaders. Once the infrastructure was in place, the staff could create more opportunities for alumni to develop professionally and strengthen their connection to Judaism, social justice and one another.

With these intended outcomes in mind, the staff developed the following list of action items:

1. Organizational Infrastructure

- » Restructure staffing approach to alumni work such that AVODAH staff takes on more significant responsibility with alumni in their area.
- » Select, train and support 14 “Network Weavers,” stipended alumni working closely with AVODAH staff to coordinate programming for alumni in their region.

- » Annually assign alumni to serve as mentors for current AVODAH corps members. This program would enable alumni to develop mentorship skills, provide much-needed support for current corps members and lessen the burden on staff, thereby freeing the organization to support local alumni work more effectively.
- » Launch a robust fundraising campaign for alumni based on Jewish ethical teachings.

2. Jewish Community Leadership

- » Support emerging Jewish professional leaders to help them obtain job and leadership opportunities.
- » Support alumni seeking speaking venues in the Jewish community where they can draw attention to antipoverty work and present concrete actions to the community that address critical challenges.

3. Connection to Judaism and Social Justice

- » Create educational training opportunities for alumni that relate to poverty, its intersection with Jewish life and methods of social change.

- » Provide stipends to encourage alumni to host Passover seders or meals on important Jewish holidays for their peers.
- » Coordinate “alumni site visits,” in which local alumni are invited to the workplaces of their peers to learn about their organizations and how they fit into the broader framework of antipoverty work.
- » Develop a toolbox with the guidelines and resources to create Jewish social justice networking and site visit opportunities for alumni in non-program cities.

Impact

Note: Case study reflects data through May 2014.

In 2014, AVODAH began to implement its new alumni strategy through the expansion of programming and community-building opportunities. At the end of the year, they reflected on their results:

1. Organizational Infrastructure

- » **Staff Restructuring:** A Director of Alumni and Community Engagement now directs and guides all alumni work, coordinates with local site staff, convenes Network Weavers and directly supports Network Weavers for non-program cities.
- » **Bridging Corps Members and Alumni:** AVODAH has increased alumni involvement with current corps members and fellows to expand its participants’ professional and community networks. AVODAH alumni are instrumental in programming throughout the year and are active in many aspects of organizational life. Since the changes took effect, alumni are now able to:
 - » Sit on AVODAH’s national board, as well as the Chicago, New Orleans and Washington, D.C. local advisory councils;
 - » Train and support incoming corps members for their summer fundraising campaigns;
 - » Play an important part in recruitment, speaking on AVODAH’s behalf at college campuses and conducting applicant interviews;

- » Serve as mentors to corps members throughout the year;
- » Participate in or facilitate educational programs hosted by each AVODAH Service Corps site; and
- » Engage with one another digitally through an active alumni listserv, Facebook groups, an alumni website and directory, Jewish resources and links to professional opportunities.

» **Network Weavers:** In 2014, AVODAH engaged 14 alumni as “Network Weavers,” leaders who work in partnership with local and national staff to plan and facilitate alumni activities. Programs have included organizational site visits, Shabbat and holiday gatherings, skill training workshops and networking events.

- » There were two Network Weavers working in each of AVODAH’s four program cities, four in non-program cities and regions (West Coast, Boston and Seattle) and two dedicated to specific roles (one dedicated to “older alumni” and one focusing on social media). The Network Weavers received national training and support from Rabbi Ruskay. Those in program cities also worked closely with the local AVODAH Directors to better integrate and align local alumni work with the activities of the Service Corps program.

» **Fundraising:** AVODAH is committed to engaging alumni as supporters and ambassadors for the organization and experienced the highest level of fundraising success to date with the 2014 alumni campaign. In contrast to prior years, alumni leaders were more involved in the 2014 campaign, the theme was highly aligned with AVODAH’s values and the online component lasted only 48 hours, which created a sense of urgency and excitement.

2. Jewish Community Leadership

» **Supporting Emerging Jewish Professional Leaders:** In 2014, AVODAH staff actively supported alumni in their efforts to attain jobs and leadership opportunities by writing recommendations, lobbying potential employers and offering alumni one-on-one coaching in preparation for job searches and interviews. AVODAH helped alumni secure jobs, fellowships, graduate school acceptances and roles as lay leaders. AVODAH staff stays in touch with these alumni regularly once they enter these positions or programs to offer support and resources that may help further their success.

» **Community Outreach:** In the last year, AVODAH facilitated a number of alumni speaking and teaching engagements with Jewish community organizations and groups. The alumni focused on raising awareness of poverty issues and empowering the Jewish community to take action. AVODAH staff worked with each alumnus in preparation for these events, planning and reviewing remarks.

3. Connection to Judaism and Social Justice

» **Jewish Learning:** AVODAH has been working with Network Weavers and other alumni to plan a number of learning opportunities for alumni to deepen their Jewish knowledge—in general and in connection with their social justice work.

- » **Holiday and Shabbat Subsidies:** AVODAH has granted small subsidies to 15 groups of six to eight alumni and their peers for High Holiday and Passover gatherings. These events placed intentional emphasis on how Jewish tradition, specifically the wisdom at the heart of these holidays, can inform one's approach to combating poverty and creating social change.
- » **Alumni Site Visits:** This year, many alumni across AVODAH's program cities hosted site visits to expose members of the local alumni network to various antipoverty organizations.
- » **Trainings on Poverty and Methods of Social Change:** Network Weavers planned several programs focused on skill building and poverty education.

Planning for 2015, AVODAH staff assessed what worked in 2014 and what was less successful. Based on their assessment, AVODAH created a plan to narrow the range of opportunities offered to alumni so that staff members could focus on optimizing the programs that were most effective. The strategies AVODAH chose to move forward with in 2015 were those that best served the needs of alumni:

- » **Refining Network Weavers:** Based on the results of the previous year, the Network Weavers initiative scaled back to program cities only (as they had been prior to 2014) and were provided with target program metrics and menus of possible activities to maximize their effectiveness.
- » **Supporting Alumni Career Development:** In 2015, AVODAH staff continues to actively support alumni in their efforts to attain jobs and leadership opportunities. The staff is also working to create tools that will enable more alumni to take advantage of this support.
- » **Fundraising:** A higher goal was set for alumni fundraising in 2015, and Alumni Board and Advisory Council members were heavily involved in the planning for the campaign. In addition, AVODAH began piloting a new intensive leadership advancement program for alumni that builds on skills gained through their experience in the Service Corps or Fellowship. This program, AVODAH Women Leading Together (AWLT), offers alumnae the opportunity for individual and small group coaching and Jewish learning.

Program participants were given opportunities to identify and enact their own personal leadership plan with the help of a dedicated team of alumnae supporters. AWLT was facilitated virtually through video conferences and webinars, which allowed alumnae across the country to participate—including several participants who were previously unable to join alumni programs because they lived in cities without Network Weavers or because of parental responsibilities. One participant reflected, "It is great to think of this group as a supportive group of women who are all helping each other strive towards their goals and dreams."

Based on the highly positive feedback from members of the pilot cohort and the continued demand from other alumni, AVODAH plans to continue and expand the program by creating cohorts based on occupation or geographical location.

Through AVODAH's strategic efforts over the past decade, it has established a robust alumni programming infrastructure, which has strengthened its alumni community as well as the experience of current corps members and fellows. Furthermore, by creating this infrastructure, the organization is better positioned to tackle its specific goals: cultivating Jewish community leaders committed to social change and fighting domestic poverty.

To learn more information about AVODAH, visit their website at www.avodah.net.

TEVEL B'TZEDEK

Case Study



Challenge

Tevel b'Tzedek (“Tevel”) is an Israeli NGO that develops and supports Israeli and Jewish leaders passionately engaged in tikkun olam—repairing the world. Tevel offers three immersive volunteer programs, ranging from one month to one year, where individuals from Israel and Jewish communities worldwide work with impoverished communities in Nepal, Haiti, Burundi and Israel to enhance the livelihood, capacity and wellbeing of their inhabitants.

Since its founding in 2007, Tevel’s work has had a significant impact—the organization has dispatched almost 700 volunteers to 13 communities across four countries. Not only have the volunteers brought about meaningful change in these communities, but the immersive service experiences have inspired Tevel participants to become Jewish leaders committed to social and environmental activism.

Despite the profound impact Tevel’s immersive volunteer programs have had on both volunteers and the communities they served, Founder and Director Rabbi Micha Odenheimer believed more could be done by sharpening their focus on Tevel’s alumni. In 2012, Rabbi Odenheimer determined that Tevel needed to design an engagement strategy for its alumni following their service trips and that Tevel would focus the bulk of its efforts on Israeli alumni.

Approach

In 2013, Tevel took its first major step toward its alumni goals by hiring Aviad Houminer, a former Tevel volunteer in Nepal, to serve as Tevel’s part-time Alumni Coordinator. Aviad’s first course of action was to meet with as many Tevel alumni as possible to better understand the alumni activities that had previously taken place and to hear suggestions for future programming.

After assessing the major challenges, Aviad developed a four-part strategy for Tevel’s alumni community—a strategy that he believed would deepen Tevel’s roots in Israeli society, while also attracting a significant number of alumni to continue their participation. Moreover, the strategy offered different levels of involvement to allow alumni to participate to the degree that best met their availability and interest. The strategy included the four core areas below:

- » **1. Educational Enrichment:** Sharpen and better define ongoing intellectual enrichment opportunities for Tevel alumni in Israel.
- » **2. Educational Activism:** Train Tevel alumni to share their social values with other young Israelis to spread the Tevel vision and boost alumni’s confidence as leaders.
- » **3. Fair Trade Activism:** Establish Tevel as the official representative of fair trade in Israel—a cause many Tevel alumni care deeply about—to empower alumni to promote sustainability and help producers in developing countries improve trading conditions.
- » **4. New Initiatives:** Support alumni in launching their own initiatives.

One year after Aviad began his alumni programming overhaul, he assessed the organization’s performance and determined that Tevel had made a great deal of progress. In one year, Tevel had successfully:

- » Piloted multiple programs to test and analyze alumni engagement;
- » Prepared alumni to be educators on issues related to Judaism and the environment through an instructive course;
- » Launched several educational enrichment programs;
- » Developed a social entrepreneurship course;
- » Initiated activism work in Israel on the issue of fair trade; and
- » Reached participation of over 50 alumni throughout the various programs, the majority of whom logged many hours of involvement.

After reviewing the past year’s work, Aviad determined that the most successful program had been the training course that prepared alumni to educate others, while the least effective segment had been the fair trade activism program. He realized that the key obstacles were time constraints—at this stage in their lives, Tevel alumni are busy with studying, working and leading social lives, and many are already involved in volunteering and social action projects in their universities or home towns.

As a result, Tevel subsequently placed more emphasis on alumni-initiated programs. Rather than overwhelm them with additional obligations, Tevel could empower alumni by supporting the projects they are already involved in and passionate about, thereby creating more buy-in and commitment.

Impact

Note: Case study reflects data through May 2014.

Tevel adjusted its alumni programming based on its initial findings, and as of November 2014, it had achieved great results across three key platforms:

1. Tevel Social Innovation Accelerator:

In partnership with PresenTense, Tevel created a widely used platform that supports its alumni in developing social action initiatives in Israel that further Tevel’s organizational goals. Participating alumni completed a training program with PresenTense and have launched four successful initiatives since the program’s inception.

2. Educational Curriculum and Content Development for the Israeli Public:

The Tevel Alumni Program and The Society for International Development-Israel initiated a joint program to educate Israeli teenagers about the challenges facing the developing world and to inspire them to become involved with international development activity.

- » Tevel and SID staff worked together to develop a three-session curriculum which was presented to the Israeli Ministry of Education and approved for implementation in high schools, pre-military programs and youth movements.

- » After receiving approval from the Ministry of Education, a curriculum training program was conducted in October 2014 for 10 Tevel alumni.
- » Participants in the training session are now certified to teach the program curriculum, which has already been marketed to potential audiences. The program has been implemented in five pre-military academies and schools including: Mechinat Amichai, Gymnasia Herzeliya and the Jerusalem Scouts.
- » Through the program, Tevel hopes to expose at least 1,000 young Israelis to the world of international development and global social justice.

3. Alumni Activism Program:

This program engages Tevel alumni in volunteer projects that advance social causes in Israel.

- » **Ongoing Projects:**
 - » **Jerusalem Gatekeepers Project:** This program, which has been open to Tevel alumni for the last three years, advocates for and creates awareness of employment rights for security personnel employed by HR companies at schools and other institutions. This project has evolved and seen great success: not only has media coverage of the project increased, but the project recently provided information to the Ministry of Industry and Trade that resulted in new “indirect” employment legislation. This year, 15 students were trained as volunteers in the program, including three Tevel alumni.
 - » **Fair trade initiative:** Because the challenges of implementing such a wide-scale program in Israel without cooperation from key corporations have been significant, Tevel decided to shift its focus to responsible consumerism. Tevel is participating in an initiative to create a public database that evaluates companies in Israel on a variety of social criteria including: pollution levels, employee rights and benefits, “family-friendliness” and utilization of fair-trade sources of production staples. WIZO Israel, Ma’agalei Tzede, TAU, She Codes, the Public Information Workshop and several other organizations are also participating in the initiative.

» New Initiatives:

- » “A tree in the city” Jerusalem Urban Agriculture Initiative: This initiative brings urban agriculture to Jerusalem to improve the city landscape and decrease the carbon footprint that results from importing produce from other areas of the country. This program provides Tevel alumni with scholarships that fund efforts to advance the initiative and recruit partner organizations to help implement specific projects throughout the city.

Through its three-pronged strategy of engaging with its alumni, piloting engagement programs and pivoting its programming based on the preliminary performance of new initiatives, Tevel has cultivated a robust array of effective alumni activities. The organization is continuing to develop innovative ways to engage its alumni, with plans to launch a Tevel Alumni giving circle in the near future.

To learn more about Tevel b’tzedek’s work, please visit their website at www.tevelbtzedek.org.

Post Script

The strength of Tevel’s alumni community and the dedication of its members were demonstrated by alumni’s remarkable response to the earthquake in Nepal in April 2015. Following the earthquake, hundreds of Tevel alumni contacted the organization’s headquarters and Nepal offices to inquire about the fate of the individuals with whom they had worked and to find ways to help.

In response to the tragedy, and to support Tevel’s relief work, more than 100 alumni took part in:

» Fundraising Events:

- » Tevel alumni organized eight different fundraising events, including three concerts, three parties, a film screening and a photo exhibit. The events attracted over 1,350 participants and raised over 4,350 shekels.
- » Tevel alumni created and promoted an online fundraising campaign that raised 70,000 shekels.

» Volunteering:

- » 10 alumni returned to Nepal to volunteer upon hearing news of the earthquake; and
- » 20 alumni volunteered at Tevel’s headquarters in Israel, helping with different aspects of the organization’s work in the aftermath of the earthquake.

» Media:

- » Many Tevel alumni were interviewed on television, radio and in print publications following the earthquake.

The response of the Tevel alumni showcased their deep emotional connection to Nepal and their commitment to the organization.

THE BRONFMAN FELLOWSHIPS

Case Study



Challenge

Founded in 1987 by Edgar M. Bronfman, The Bronfman Fellowships is now a flagship program for outstanding young Jews in North America and Israel that recruits future influencers at a formative point in their lives and immerses them in the study of Jewish texts, pluralism and social responsibility.

Through a highly selective process, the program recruits high school juniors to participate in transformational educational experiences in Israel and North America. After completing their fellowships, Bronfman Fellows become part of a lifelong alumni community where members inspire and support each other. In its almost 30-year history, the Bronfman Fellowships have grown into a vibrant network of over 1,000 individuals that includes some of today's most renowned Jewish writers, thinkers and leaders.

The Fellowships place great importance on identifying ways to enhance the discourse between past participants of the North American and Israeli Fellowships, which together compose

the Bronfman alumni community. Over time, the organization's leadership realized that the communities consisted of a variety of age demographics, lifestyles and interest areas, and it would therefore benefit the organization to develop programming for the alumni communities separately. The remainder of this case study will focus primarily on the development of the North American alumni community; however, the Bronfman Fellowships offer additional programming to the Israeli alumni community and continue to implement joint initiatives between the two communities in strategically aligned areas.

While creating a lifelong community has been an integral aspect of the Bronfman Fellowships' mission since their founding, their approach to achieving this vision has evolved over time. As the Fellowships continued to grow, the alumni community began to encompass individuals across different life stages. In the early 2000s, Bronfman began to consider the ways it could strengthen and expand its alumni model to adapt to this shift.

Approach

Creating a lifelong community has been part of the organization's mission and structure since its founding. From the moment new Fellows receive their acceptance letters, Bronfman emphasizes the vibrancy of the greater alumni community, referred to as the "Bronfmanim." Consistent with this long-term vision, the Fellowships have been offering informal programming for their alumni since their earliest years. The program hosted annual reunion retreats, sent out regular newsletters featuring articles by alumni and "class notes," managed an online alumni discussion listserv, and hosted occasional alumni events and gatherings. However, in 2003, the organization decided it was time to take a more strategic approach to building its alumni community.

The first step in this process was the creation of an **Alumni Advisory Board**, a diverse group of alumni who are selected to collectively serve as a "think tank" for alumni life. The Board advocates on behalf of Bronfman alumni, developing new ideas and facilitating existing processes.

One of the first major initiatives that stemmed from the Alumni Advisory Board was the creation of the **Alumni Venture Fund** in 2005, the first-of-its-kind peer-to-peer grant program for and by alumni. Based on the successful implementation of these two initiatives, the Samuel Bronfman Foundation (the Fellowships' major funder) hosted a think tank to explore next steps for the program. A mix of faculty and alumni participated in the think tank, and the primary goal that emerged was to hire a Director of Alumni Engagement responsible for spearheading a focused strategy that would enhance alumni life and the broader Jewish community.

In 2008, the Bronfman Fellowships took the next major step in strengthening their alumni community by hiring Rebecca Voorwinde to serve as its first staff member dedicated to alumni engagement. Rebecca's first official act was the assembly of a detailed strategy document that mapped out the alumni community. After conducting a major alumni survey in 2008 and transferring information to Salesforce, Rebecca analyzed the data to get a clearer portrait of their alumni network.

Over the next few years, Rebecca worked closely with the Alumni Advisory Board and members of the community to develop a plan with one goal in mind: to segment Bronfman's diverse alumni community so the organization could best address the needs and interests of its many cohorts and age groups. During this process, the team identified a few core principles that would ultimately shape the development of its alumni strategy. They recognized that to build effective and appealing "alumni life," they could not design alumni programming separately from the core Fellowship program; rather, core programming and alumni strategy had to be designed in tandem. In addition, the team determined that the organization had to change its metrics approach: rather than focusing solely on quantitative metrics (such as event attendance), it had to expand its analysis to include qualitative, relationship-focused methods of tracking engagement. Staff have aimed to "get to know" alumni as individuals, placing the greatest value on metrics that indicate depth of connection to the organization and depth of connection between alumni. The final piece of the strategy was identifying ways to support alumni at different life stages and critical "inflection points."

In 2011, the Bronfman Fellowships underwent a leadership transition that resulted in another significant shift in the implementation of alumni initiatives. Rebecca was named Co-Director of the program, along with Rabbi Mishael Zion, and they decided to increase the staff dedicated to alumni to turn their strategy into a reality. The new increase in staff enabled them to strengthen their alumni community based on the aforementioned principles, and they began executing this vision through the following strategies:

Intergenerational Connections:

» **During Initial Fellowship Year:**

- » **Ma'aseh (Action) Projects:** An integral aspect of the Bronfman Fellowship experience is getting involved in a local community project during their senior year of high school. The program pairs older alumni advisors with Fellows to share expertise that relates to the specific project and to introduce Bronfman Fellows to the alumni network.
- » **Recruiting:** The organization has a multi-tiered selection process for incoming Fellows, and it decided to make alumni integral to this process. In stage one of the selection process, two alumni review each application—a great opportunity to keep alumni involved with the program and enable them to shape the future of the community. Once chosen, Fellows are informed that alumni played a key role in their selection, which makes clear from the very beginning of their experience that they are joining an exciting, ongoing community.
- » **Alumni Speakers:** Alumni of varying skill levels, from college students to established experts in various fields, are asked to speak during both Fellowship and alumni programming—showing younger alumni the diversity and power of the community and providing older alumni a meaningful way to remain involved and give back.

» **Continued Involvement:**

- » **Mentorship:** To harness the power of the Bronfman Fellowships' talented and diverse alumni, staff facilitated strategic networking among Bronfmanim to inspire, engage and amplify the impact of the community.
- » **Caring Initiative:** In 2014, the Alumni Advisory Board created a new initiative to cultivate a culture of support for Bronfmanim and their families. Through this initiative, the Bronfman Fellowships have shifted their alumni outreach to support them through life's challenges, in addition to its triumphs.
- » **Professional Connections:** The program has become a critical resource for alumni seeking career advice and opportunities. Bronfman tracks the career progression of its alumni, makes thoughtful connections and introductions between its community members and provides guidance and resources in the opportunities section of its weekly emails and during the annual Collegiate Reunion. The team has also focused on facilitating valuable professional connections between its North American and Israeli alumni.

Programming and Events:

- » **Immersive Programming:** In 2011, the Bronfman Fellowships began experimenting with cohort-based immersive programming for alumni. Due to the organization's small staff size and desire to provide programming to alumni at different life stages, the team decided to change up their programming every year to ensure that every age group was provided opportunities for involvement. Bronfman has continually experimented with new opportunities, starting with the following:
 - » **Bronfman Campus Ambassadors:** Through a grant from Repair the World, Bronfman was able to offer a year-long fellowship program for Bronfmanim leading service projects on college campuses from 2011 to 2014.

» **Roundtable:** In 2014, the organization hosted a special seminar for collegiate alumni discussing Israel discourse on campus, in response to requests by alumni.

» **Alumni “Doers”:** In 2015, to celebrate its 10th year of the Alumni Venture Fund, the Fellowships created a daylong seminar for grantees and alumni, titled “A Day Away from Your To Do List.” The seminar convened alumni from both Israel and the U.S. and focused on personal reflection, continued learning and connecting with peers.

» **Older Israeli Alumni Gathering:** In 2015, the program will host its first overnight retreat for the alumni of the first eight Israeli cohorts. By keeping the age range of the group narrow, content can be tailored to address the topics most important to those who are just starting careers and families.

» **Collegiate Reunion:** The Bronfman Fellowships have offered an annual gathering of college-aged alumni at a campus in the Northeastern U.S. since the program’s earliest years. In 2012, the organization decided to prioritize the event and help every collegiate alumnus attend at least one Collegiate Reunion during his or her college career. The staff offered travel stipends to alumni outside of the Northeast who may not otherwise have the means to attend the event. In Israel, army and post-army alumni are invited to a yearly shabbaton (weekend retreat), mirroring the approach and vision for the collegiate reunion. A highlight of these reunions is the opportunity for alumni to sign up for “office hours” and have one-on-one conversations with staff.

» **Milestone Reunions:** Until the late 1990s, the Bronfman Fellowships held a large annual weekend retreat for alumni of all ages. Once the program entered its 15th year, a decision was made to instead mark milestones every five years. These large-scale reunion gatherings are located in a major city and consist of smaller cohort-based activities, Shabbat meals and a big “party” for all attendees.

» **Regional Events:** In cities with at least five alumni, the organization encourages local “living room” gatherings that include shared meals, discussions and Jewish learning. When staff members travel outside of Israel or New York, they host local events at the homes of alumni. Because geography is easier to traverse in Israel, larger-scale alumni events take place in Tel Aviv or Jerusalem to attract alumni from all over the country. Major annual Israeli events include an arts-based functions at local bars and panel discussions with policy experts.

» **Virtual Community:** Bronfman has increased the number of virtual community opportunities in the past few years, crystallizing their effort to feature Rabbi Mishael Zion, the program’s Co-Director and Director of Education, as a virtual Rabbi for the community. With Rabbi Zion at the helm, individuals who are not affiliated with another Jewish community and those seeking a pluralistic perspective can turn to him for guidance.

» The Bronfman Fellowships began experimenting with “lifecycle calls” for alumni at different critical life milestones. Calls have focused on a number of topics, including upcoming weddings, Bar/Bat Mitzvah preparation and parenting for young children.

» The program launched “Bronftalks,” a series of conference calls focused on current events that feature notable alumni and parents of alumni as keynote speakers.

» After the death of the Fellowships’ founder, Edgar M. Bronfman, alumni committed to reading a book or studying a text in Edgar’s memory. The organization arranged virtual “chevrutahs” (group learning) and webinars with the authors of the three books selected for collective study.

Communication:

» In a group of over 1,000 people, communication plays an important role in how alumni perceive and interact with the community. Beginning in 2015, the Bronfman Fellowships now have a staff member dedicated to this type of communications, who engages with alumni across the following platforms:

- » **Social Media:** The organization has a presence on Facebook, Twitter, LinkedIn and Instagram, platforms that allow them to instill pride in the community, share content and foster connections.
- » **EverTrue:** The Fellowships began using an app called EverTrue to facilitate alumni connections across the community. Through EverTrue, users can search for others based on geography, profession and age.
- » **Listserv:** The program's listserv has been in place since the 1990s, but has remained an effective, organic forum for communication within their alumni network. The listserv is an ongoing, unmoderated, uncensored conversation that has remained a crucial medium for alumni to engage in important conversations.
- » **Weekly Rotating Emails:** Each week alumni receive an email compilation of jobs and opportunities, and an additional weekly digest of housing requests and alumni updates. By keeping announcement-style messaging separate, these emails keep listserv activity lively and prevent it from becoming mundane. In addition, alumni receive occasional programmatic updates, Fellowship highlights, event announcements and Alumni Venture Fund updates throughout the year.
- » **Weekly D'var Torah Emails:** Each week, Rabbi Mishael Zion shares a D'var Torah (commentary on the weekly Torah portion) with the community. In 2014, Rabbi Zion began writing monthly commentaries and allowed different alumni write their own Divrei Torah in the remaining weeks. Rabbi Zion provides editorial support and guidance for each submission.
- » **Annual Publication:** Each year, the organization releases an alumni newsletter, magazine or report that shifts in size and scope. In the past, the content has included alumni profiles, programming content overviews and community highlights.

Impact

Note: Case study reflects data through June 2014.

In 2014, 76% of program alumni interacted with the Bronfman community through the listserv, magazine, reunions, events, mentoring other alumni or supporting the Alumni Venture Fund. The staff interacted directly with 324 alumni via one-on-one catch-ups and 356 alumni at events.

Alumni Venture Fund:

- » Since 2005, the program's award-winning Alumni Venture Fund has supported alumni-led initiatives aligned with Bronfman values. In 2013, the organization decided to make the Alumni Venture Fund the primary vehicle for collaboration between its North American and Israeli communities, opening up the Fund to applications and donations from Israeli alumni and making the grantmaking process a co-deliberation between the two communities.
- » 2014 was a record year for grant applications and donations: \$32,000 was raised from 150 donors and 30% of Israeli alumni contributed.
- » Over the last 10 years, \$245,000 has been distributed in grants, over 200 projects have been supported and over 500 Bronfmanim have donated to the fund, representing 50% of the alumni community.

Intergenerational Connections:

- » **Recruiting:** In 2014, approximately 40 alumni served as application readers.
- » **Alumni Speakers:** 8 Bronfman alumni were speakers during the 2014 Fellowship seminars.
- » **Caring Initiative:** In 2014, after the launch of the new Caring Initiative, many alumni signed up to serve as community resources on infertility, divorce, LGBT family life, career changes, interfaith marriage, chronic illness, loss and mourning and mental health challenges.
 - » Bronfmanim reached out to bereaved community members by offering condolences, suggesting helpful resources and attending shiva.
 - » In 2014, three text study events were held to discuss loss and healing.
 - » 46 Bronfmanim joined a new parenting listserv.

Programming and Events:

- » **Immersive Programming:**
 - » In 2014, 12 college-aged Bronfmanim came together to reflect on Israel discourse on campus.
 - » In 2015, the Bronfman Fellowships held their first seminar for Alumni Venture Fund grantees.
- » **Collegiate Reunion:** Since the program shifted its focus to boosting the attendance of alumni outside of the Northeast, participation rates have skyrocketed. In 2014, 60% of college age Bronfman alumni gathered at Princeton for the annual Collegiate Reunion, and in Israel, 70% of army/post-army alumni attended their annual reunion.

- » **Regional Events:** In 2014, Bronfmanim gathered in Chicago, Los Angeles, New York, Philadelphia, San Francisco, Washington D.C., Be’er Sheva, Haifa, Jerusalem and Tel Aviv.
- » **Virtual Community:**
 - » Bronfman held 8 “Bronftalks,” lunchtime briefing calls by Bronfman alumni on topics ranging from mass incarceration to the protests in Ferguson.
 - » 20 Bronfmanim joined virtual “chevrutahs” (pairings for Jewish text study) to learn together over the course of 2014.

Communication:

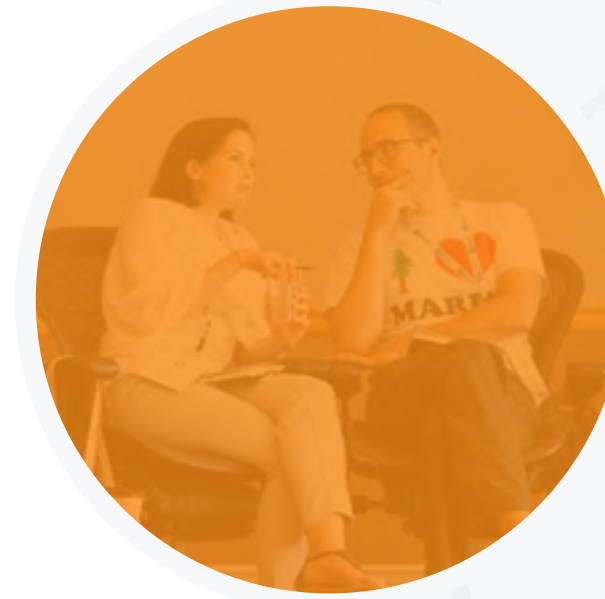
- » **EverTrue:** 25% of Bronfman alumni downloaded EverTrue, the alumni directory app.
- » **Listserv:** The Listserv continues to be the chosen platform for conversation; in 2014, 20% of Bronfman alumni shared their thoughts in over 380 posts.
- » **Weekly D’var Torah Emails:** Weekly Torah insights written by Bronfmanim and staff are read by over 35% of the community.
- » **Annual Publication:** In 2014, the organization began fundraising for its core Fellowship programming for the first time. As a result, staff created an annual report to highlight the community’s impact. As of June 2015, over 70% of the \$120,000 annual fundraising goal has been raised.

Thanks to Edgar Bronfman's vision and the dedication of its staff, the Bronfman Fellowships have created a remarkable Jewish community for those who share a passion for learning and questioning, wish to gain the skills to make a difference in the world and want support from a powerful network of over 1,000 high-impact alumni.

The Bronfman Fellowships is a 501c3 operating foundation that receives core support from an annual grant from the Samuel Bronfman Foundation and additional funding from individuals donors and foundations.

To learn more about Bronfman Fellowships' alumni community, please visit:

www.bronfman.org/alumni-life.



JDC-ENTWINE

Case Study



Challenge

The American Jewish Joint Distribution Committee (JDC) is the world's leading Jewish humanitarian assistance organization, impacting millions of lives in more than 70 countries. JDC leverages a century's experience confronting poverty and crisis around the world to assist the world's poorest Jews, revitalize Jewish life, empower Israel's future, develop tomorrow's Jewish leaders and rescue victims of global emergencies.

In 2008, JDC made a strategic decision: encouraging young Jews in their 20s and 30s to respond to global Jewish and humanitarian needs must be central to JDC's work moving forward.

What began as small pilot programs in 2008 quickly grew into what is now JDC Entwine ("Entwine"). Today, Entwine reaches over 20,000 young adults through a diverse set of international service, local education and leadership opportunities for young Jews that emphasize global Jewish responsibility and recharge Jewish identity.

As Entwine has expanded its reach and depth, the organization has faced a two-pronged challenge: how to engage the impressive volume of alumni of its overseas service programs and simultaneously build a captivating initiative for young adults, primarily in North America, around an issue that is outward-looking and globally-oriented.

Approach

By 2008, Entwine’s continuum of overseas service programs, including 7-10 day service trips and the year-long Global Jewish Service Corps, had reached over 160 participants a year. As the number of alumni grew, Entwine’s leadership decided that in addition to providing a meaningful overseas experience, the organization’s responsibility would extend to post-trip programming once alumni returned. The organization would achieve this goal by developing distinct pathways for alumni within Entwine and connecting alumni to programs in the broader community. Entwine also noticed that as participants returned from overseas service experiences, they were eager to share their newfound knowledge with their peers. With this in mind, Entwine piloted a few local educational events for the broader public, with these enthusiastic alumni serving as volunteer leaders.

Concurrently, Entwine worked with a group of students participating in a NYU-Wagner School capstone program to carry out one of the largest surveys of young Jewish attitudes in recent years. The findings indicated that young Jews are interested in helping Jews in need around the world, but know little about global Jewry or issues relevant to overseas communities. The study also revealed that in order to be effective, efforts to raise awareness of these issues must be authentic and must incorporate meaningful content—by and large, young Jews would rather explore high-level educational opportunities or intimate Shabbat dinners with friends than attend more casual social functions like bar nights.

Based on the results of the NYU-Wagner study and feedback from alumni, Entwine identified a unique opportunity to simultaneously create engaging programming for its alumni and address a problem in the broader community. The staff saw a growing group of passionate young people returning from global Jewish service experiences who were looking to share what they learned and to become Jewishly involved. Separately, there was a need to create locally-based educational programming for young adults unfamiliar with global Jewish communities and issues. Identifying these closely related trends gave rise to Entwine’s Learning Network Model.

Entwine Learning Networks:

- » Entwine designed its Learning Networks to achieve two critical objectives: 1) Provide service alumni with an opportunity to engage in meaningful follow-up work and to demonstrate leadership; and 2) Create an entry point for new individuals to engage with their peers.
- » Entwine decided that the Networks would be peer-led through an informal volunteer Planning Group, which would create education-based programs to attract like-minded peers and provide unique, relevant content. The Networks focus on young adults, primarily 24 to 36 years old, who are looking to develop their career trajectory and forge personal relationships in their communities. The educational program content is delivered by peer experts, many of whom are also alumni of Entwine service programs.
- » Each Learning Network is led by a volunteer Planning Group comprised of service alumni who conceptualize and spearhead the educational programming. The Learning Network events are intentionally designed to be informal, open to all and with no requirements to join. Built into the Network are volunteer leadership opportunities: all programs have Event Co-Chairs and each Planning Group is led by a pair of Co-Chairs, who serve for 2-year terms and help guide the strategic direction of the Network.
- » The Network model is intentionally designed to promote volunteer leadership, with Entwine’s staff supporting and developing aspiring leaders. Even as Entwine’s professional team in charge of supporting the Networks has expanded, each staff member is still responsible for multiple Networks to preserve the leadership integrity of volunteers.

- » By 2010, Entwine had established Learning Networks in five cities: New York, D.C., Boston, Los Angeles and San Francisco. Through the work of their local Planning Groups, the Networks implemented peer-led, large-scale public programs around topics ranging from global Jewish communities—such as those in Morocco and Cuba—to JDC’s relief efforts in Haiti.

Program Integration:

- » As the Networks grew, Entwine began to strategically prioritize the recruitment of service program participants from cities with Learning Networks to ensure that alumni returning from their overseas service experiences would have opportunities for immediate follow-up and access to leadership pathways.

Entwine also intentionally designed its overseas service programs with post-program follow-through in mind: from the interview process, which includes questions about participants’ post-trip plans, to the final sessions on the ground in which groups discuss “bringing it home” and post-trip opportunities in their local Network cities, follow-through is woven throughout.

Strategic Communication:

- » Entwine organized a system of strategic communications to connect service participants with their local Learning Networks. Leading up to a trip, participants receive communications from local Network Co-Chairs, who introduce themselves and

wish them a safe trip. This communication connects service participants to their local Entwine communities before they embark on their overseas experience. Upon returning home, alumni receive communications from their group leader, followed by one-on-one communication from local Co-Chairs or Planning Group members asking them to meet for coffee, share their experiences and attend upcoming meetings and programs.

- » Local Network event attendees also receive follow-up communications, which include ways to get more involved both locally and through the overseas service programs. In this way, Entwine’s approach is truly global-to-local and local-to-global: the global service experiences for young adults fuel their Jewish involvement back home in the local Learning Networks and in turn, the local programs fuel participation in the global service experiences.

By 2013, Learning Networks had expanded to nine cities with the addition of San Diego, Houston, Dallas, and London. The Networks had attracted thousands of young Jews, many of whom were learning about global Jewish issues for the first time. Simultaneously, Entwine began to realize that the Networks were not only providing educational programming and leadership opportunities, but also building locally-based micro-communities of like-minded Jewish young adults who celebrate together, plan together, serve together and lead together. In response, the Networks began to offer smaller, more intimate programs focused on community-building, including Shabbat dinners, local days of service, “meet-ups” and other events, which are now a core component of Network programming.

Impact

Note: Case study reflects data through May 2014.

Since 2008, Entwine has experienced incredible growth:

- » 3,100+ young adults have participated in Entwine’s short-, medium-, and long-term, immersive global service experiences;
- » 150+ volunteer Trip Co-Chairs have led Entwine Insider Trips and nearly 100% are alumni of previous service programs;
- » 15,000+ young adults have attended local Learning Network programs across the U.S. and the U.K.;
- » 500+ volunteer Event Co-Chairs, of which 80% are alumni, have led local Learning Network programs;
- » Of all large-scale Learning Network program attendees, 60% are new and 40% are alumni; and
- » 70% of local Planning Group members and 100% of local Network Co-Chairs are alumni.

Today, Entwine has fostered a movement of young adults who see global Jewish responsibility as central to their identity and are making a meaningful impact on Jewish issues worldwide. Inspired by these values, Entwine’s local-to-global platform has created a space for alumni to take on leadership roles and serve as active members of their Jewish communities.

Entwine’s approach to alumni engagement is unique. Rather than develop a separate alumni strategy, Entwine’s model emphasizes an integrated platform of avenues for young people to deepen their involvement and leadership both at home and abroad, fostering ongoing engagement with global Jewish issues and Jewish life.



TOOLKIT

Resources and Reading

Looking for more? Peruse our list of resources, samples and readings to bring your alumni strategy to the next level!

Alumni Tips and Reports:

- » [The Napa Group – Trends and Best Practices in Alumni Associations](#)
- » [Successful Alumni Networks: From the Round Table to the Reunion \(by No'a Gorlin\)](#)
- » [Association of Yale Alumni – Recruiting Yale Alumni](#)
- » [Alumni Relations and Institutional Giving \(Finnish Higher Education Experts, USA Study Tour 2012 Report\)](#)
- » [Yale Global Alumni Leadership Exchange – The Resource Book](#)
- » [NetTalks – Alumni Engagement Webinar Series:](#)

Sample Alumni Strategic Plans:

- » [Association of Yale Alumni Strategic Plan](#)
- » [University of Virginia Alumni Relations Task Force](#)

Fostering a Culture of Giving:

- » [Stages of Giving, Preparing Students for a Lifetime of Giving, Fostering Giving in Young Alumni \(pages 78-84\)](#)
- » [The Engagement Continuum \(pages 12-13\)](#)

Social Media Tips:

- » Design Free Online Surveys: [SurveyMonkey](#) or [Zoomerang](#)
- » [Setting up Social Media](#)
- » [Social Media Basics](#)

Sample Alumni Newsletters:

- » [Teach For America Alumni Magazine](#)
- » [Bronfman Alumni Magazine](#)
- » [ROI Newsletter](#)

Sample Alumni Awards:

- » [Teach For America Alumni Awards](#)
- » [Yale Alumni Awards](#)

Featured Alumni Communities:

- » [Association of Yale Alumni](#)
- » [AVODAH](#)
- » [Birthright Israel Excel](#)
- » [The Bronfman Fellowships](#)
- » [Entwine](#)
- » [Moishe House](#)
- » [ROI Community](#)
- » [Teach For America](#)
- » [Tevel b'Tzedek](#)
- » [Wexner Heritage Program](#)





DISCUSSION GUIDE

Thank you for reading the Alumni Playbook. We hope that you found the content informative and will use it to spark a deeper discussion on this important topic within your community or organization.

While it is up to you to consider who is in the room for these conversations, we believe the most powerful change will happen by engaging professional and lay leaders who are responsible for implementing new practices at all levels of the organization, including managers of teams and team members. You may also consider including a select group of past participants who can provide helpful insights and perspectives.

We encourage you to pursue an approach that feels right for your group. Here are a few ideas:

» **Lunch and Learn**

» Participants can read through the Alumni Playbook together and then have a discussion.

» **Book Club**

» Participants can read through the Alumni Playbook in advance and come ready to have a conversation.

» **Small Group Discussions**

» Participants can discuss these topics in small groups prior to an organization-wide discussion.

Regardless of the approach you choose, the following questions may be helpful for fostering a rich, inclusive dialogue:

- » What are 2-3 key ideas you took away from the Alumni Playbook?
- » Where are you currently within the alumni matrix? What could you do to move closer to the upper right quadrant?
- » Are you already utilizing any of the suggested best practices or programming ideas? If so, what are you doing, how well are they working and what could you be doing better?
- » Have you seen any of the strategies discussed in the Alumni Playbook implemented in past professional experiences that you are not currently doing? Share what worked.
- » What are some specific things you can do to create a culture of ongoing involvement in your community?
- » Are you currently engaging alumni to develop their own programming? If not, how can you establish your own Do-It-Yourself framework?
- » Did you learn anything new that could be implemented immediately to score a “quick win”?
- » What structure and plans do you need to put in place to move this conversation forward?



